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Maritime routes, chokepoints and the relevance of geography (I). The Strait of Hormuz. Current situation.

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Abstract:

In the context of the war between the United States and Israel on one side and Iran on the other, the Strait of Hormuz remains Iran's 'ace in the hole'. Tehran's ability to block the strait—and the United States' ability to counter-block ships with Iranian interests—is causing a significant reduction in the volume of oil and gas leaving the Persian Gulf, with a consequent impact on the global economy.

Geography continues to give Iran a significant advantage in the Strait of Hormuz, enabling it to mitigate the impact of American military superiority in a clearly lopsided conflict. Whilst the United States seeks to strangle the Iranian economy, Tehran is striving to maximise its geographical advantage by using low-cost weapons (drones, missiles and mines), rerouting shipping lanes closer to its coastline, and even attempting to impose tolls on passage—in defiance of the rules-based order and the ‘law of the sea’.

After more than six months of conflict, the flow of crude oil out of the Persian Gulf is beginning to recover, with Iran exhausted yet resilient, and the United States mounting an enormous military effort—particularly naval—that may not be sustainable for long. This situation compels both sides to seek a negotiated settlement, with each party striving to achieve the greatest military successes possible in order to arrive at the negotiating table with the strongest hand

Keywords:

Strait of Hormuz, geography, blockade, drones, oil, oil pipeline, Bab el-Mandeb, economic pressure, resilience, law of the sea, right of transit passage.

***NOTE:** The views expressed in the **Analysis Papers** are those of the authors and do not necessarily reflect the views of the IEEE or the Ministry of Defence.

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INTRODUCTION

Josep Piqué, who, in addition to being a minister, was executive director of the journal *‘Política Exterior’*, stated: *‘to understand the world, one must read history and look at maps’*¹. Whilst there has been much talk in recent years of the return of history in the reconfiguration of the new world's order, geography is not far behind – if indeed it ever went away.

If we focus on its maritime dimension, it is worth remembering that over 80% of international trade (by volume) is carried out by sea, which is the cheapest and most accessible way to trade. However, some of the shipping routes – the ‘motorways’ along which most goods and raw materials travel – have narrow passages (known as *‘choke points’*), where both coastal states and third parties can hinder or even prevent navigation through them, with the consequent impact on international trade and the global economy itself.

For many years now, when the US was still the great superpower, Piqué was already arguing that the planet's centre of gravity in the 21st century would be centred on the Strait of Malacca², through which a quarter of global international maritime trade passes. No one doubts this any longer, and indeed Washington's pivot to the Indo-Pacific – its area of greatest geopolitical interest – only serves to highlight the importance of Malacca.

If we remain in the Indian Ocean and sail north-west from the Strait of Malacca, we reach the Strait of Hormuz, which, together with the Strait of Malacca, can be said to be the two key geographical hubs for the maritime transport and trade of hydrocarbons. Figure 1 illustrates the importance of both straits: the Strait of Malacca, which, as well as being the centre of gravity for general trade, is also the centre of gravity for hydrocarbon trade (the vast majority of hydrocarbons imported by China, Japan and South Korea pass through it), whilst the Strait of Hormuz is the key point for the maritime export of gas and oil from the Persian Gulf (the world's leading producer), the main destination for which is also Asia (India is added to the three countries mentioned above, although the latter is not subject to the Strait of Malacca's vulnerability).

¹ <https://www.politicaexterior.com/articulo/mirar-un-mapa-el-estrecho-de-malaca-centro-de-gravedad-del-mundo/>

² *Ibid.*

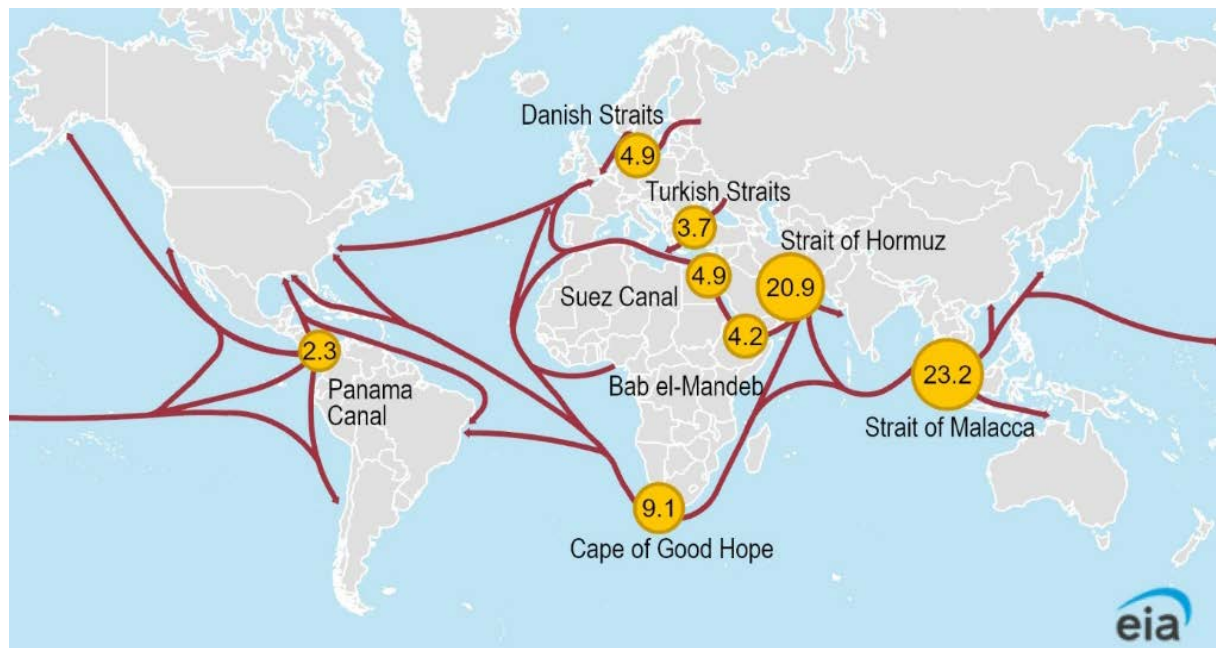


Figure 1. Transit volume of oil and petroleum products (millions of barrels per day) through maritime chokepoints (2025).
https://www.eia.gov/international/analysis/special-topics/World_Oil_Transit_Chokepoints

A common feature that makes them even more significant is that neither has a clear alternative. If the Bab-el-Mandeb Strait (the entrance/exit to the Red Sea) were to be closed, we would be left with the option of circumnavigating Africa – a longer distance, higher cost and greater time, but, ultimately, an alternative. Malacca, with few and difficult alternatives (Sunda, Lombok, etc.), and above all Hormuz, with no other maritime option, are particularly unique.

Robert Kaplan, in his book **The Revenge of Geography**³, highlighted the importance of taking geography into account in calculations of power. If we focus on the Persian Gulf, Tim Marshall, in his book **Prisoners of Geography**, emphasised very directly that Iran has ‘*an ace up its sleeve*’, namely its ability to close the Strait of Hormuz⁴. Geopolitics seeks only to understand the power relations between states, using geography as an explanatory variable, and Hormuz is a clear example of how geography influences – and in some cases can determine – the course of a conflict, as is clearly evident in the current confrontation between the US and Israel on one side and Iran on the other.

³ Kaplan, R. *The Revenge of Geography*. RBA Libros y Publicaciones, Barcelona, 2015.

⁴ Marshall, T. **Prisoners of Geography**. Ediciones Península, Barcelona, 2017 (p. 222).

HORMUZ: A GEOGRAPHICAL PIVOT FOR GLOBAL HYDROCARBON TRADE.

Whilst for years the West's main concern regarding Iran was that it might develop nuclear weapons, the current conflict between the United States and Iran – and in particular the situation in the Persian Gulf region (which holds 50% of the world's oil reserves and around 40% of its gas reserves) – is **showing** that Tehran already possesses, in fact, a formidable weapon.

Its geography, combined with its capacity to launch attacks using low-cost weapons, gives it de facto control of the Strait of Hormuz, through which one-fifth of the world's oil and liquefied natural gas (LNG) passes⁵ (Figure 2), to which must be added fertilisers (one-third of global trade)⁶, helium (critical for the development of state-of-the-art microprocessors), and significant container traffic (high-value cargo), particularly to the Emirati port of Jebel Ali (Dubai), the ninth busiest port in the world.

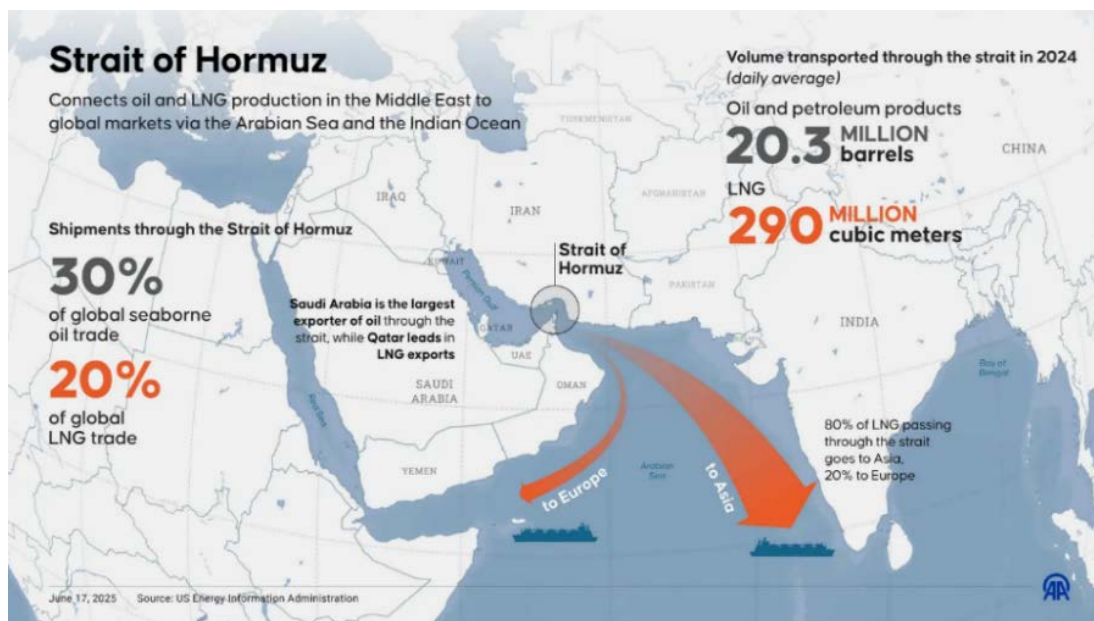


Figure 2. Volume of oil and gas passing through the Strait of Hormuz (June 2025). Source: US EIA

80% of the hydrocarbons leaving the Persian Gulf (15 million barrels per day of crude oil and 6 million b/d of petroleum products) are destined for Asian countries, with China, India, Japan and South Korea being the main recipients (Figure 3).

⁵ Globally, just over 100 million barrels of oil are consumed every day (including derivatives).

⁶ Many countries, both in Asia and Africa, are heavily dependent on fertiliser imports from the Persian Gulf for their agriculture (Sudan at 54 per cent, Sri Lanka at 36 per cent and Australia at 32 per cent). Data available at: <https://unctad.org/publication/strait-hormuz-disruptions-implications-global-trade-and-development>

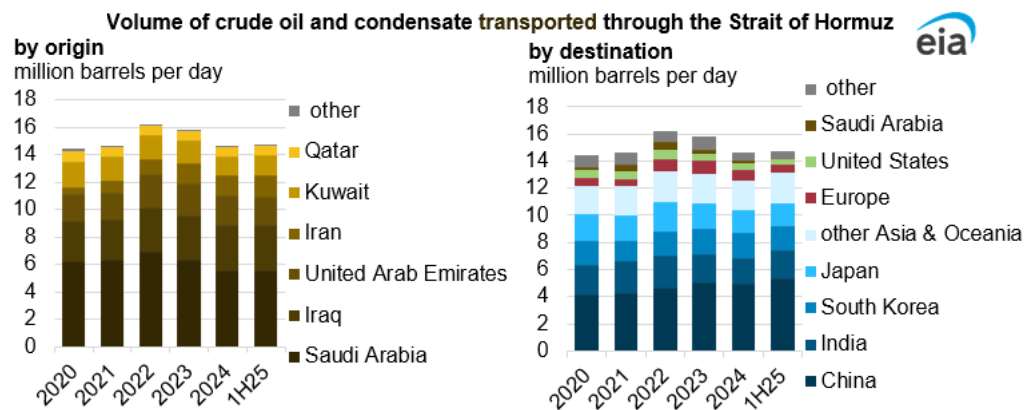


Figure 3. Volume of crude oil passing through the Strait of Hormuz, broken down by country of origin and destination.

The waters of the Strait of Hormuz are not easy to navigate. Although the strait is just over 30 km wide, the waters are shallow, averaging around 70–80 metres and reaching a little over 200 metres in some parts, which makes it advisable to establish entry and exit channels⁷. In the context of the current conflict, Iran has modified the traditional



Figure 4. Strait of Hormuz (includes traffic separation schemes, dashed lines)

arrangement to bring it slightly closer to its coastline, thereby enabling it to monitor traffic passing through the Strait of Hormuz more closely.

The entire northern coast of the Persian Gulf, including Hormuz, belongs to Iran. It is a mountainous country, with terrain rising to heights of up to 1,000 metres just a few kilometres from the coast (a natural barrier that protects it from naval incursions), which puts it in an advantageous position. Thus, its rugged coastline, islands and shallow waters ease control

over the Strait of Hormuz; whilst this may not constitute positive control (ensuring its use for their own benefit), it does allow for negative

⁷ Oil tankers, which carry between 2 and 3 million barrels of oil, have draughts of up to 25 metres.

control⁸ (preventing third parties from using it), currently achieved through attacks on maritime traffic using drones, missiles fired from coastal outposts, speedboats, or by laying mines in the waters of the strait. The geography tends to favour the defender, and in this case, choking off this key trade artery is giving the Ayatollahs' regime an advantage over its adversaries⁹, although it is also suffering, and severely so, from the counterblockade imposed by the United States.

The blockade of Iran and the US counterblockade

On 28 February, following on from the attacks in June 2025 (Operations *Midnight Hammer* and *Rising Lion*), the US, together with Israel, resumed attacks on Iran, prompting a reaction from Tehran, which imposed a blockade in the Strait on vessels not of interest to it. This, in turn, led to a US counterblockade targeting vessels bound for or departing from Iranian ports.

This dual blockade has a massive impact on the maritime transport of hydrocarbons through the Strait of Hormuz, leading to global economic consequences, soaring energy prices, rising inflation, and delays in supply chains.

The US blockade relies primarily on the power of its air force deployed at bases in the Gulf, and above all on its naval presence – the aircraft carrier strike groups sailing in the Gulf of Oman and the northern Indian Ocean – which protect and escort vessels from the Persian Gulf's allied nations, and from which attacks are launched against vessels leaving or heading for Iranian ports in an attempt to break the blockade.

On the other hand, Iran seeks to block the passage of ships by threatening to lay naval mines and by launching attacks using drones, missiles or speedboats from its coastline. Whilst in the 1980s, during the so-called 'Tanker War'¹⁰ as part of the Iran-Iraq conflict, mines were the primary weapon used to attempt to deny access to the strait. In the current conflict, in addition to mines, systems developed using new technologies are predominantly employed: (inexpensive) drones, cruise missiles, and commercial

⁸ In classical maritime geopolitics, 'negative control of the sea' (or of a maritime space) refers to a situation in which an actor cannot exploit that maritime space, but can prevent other actors from doing so. In this case, Iran cannot guarantee the use of the maritime route through the Strait of Hormuz by its own vessels, as it lacks the capacity to ensure safe passage through the strait, but it can prevent other vessels from sailing that route.

⁹ <https://www.economist.com/middle-east-and-africa/2026/08/03/how-long-can-iran-weaponise-hormuz>

¹⁰ <https://www.bbc.com/mundo/noticias-internacional-48725441>

sensors, all of which are mounted on mobile launch platforms.

It is estimated that Iran may have around 6,000 mines, although the true extent of this threat is unknown. Unlike in the 1980s, mines are playing a lesser role in this conflict, and this threat appears to be successfully neutralised by divers and unmanned vehicles operated by the *US Navy SEALs*¹¹, at least in the southern half of the strait, off the coast near Oman (Figure 7).

To date, no mine strikes have been confirmed (beyond possible propaganda from the Iranian Republican National Guard), but uncertainty is Iran's trump card. The mere assertion that mines have been laid is a weapon in itself. It is the information game that takes precedence over what is actually happening underwater¹².

As for the other weapons, the terrain, combined with the number of drones and/or missiles that can be launched, and the mobility of their launchers, make it very difficult to counter this threat, at least effectively. Furthermore, Iran does not need to attack constantly or against everything: a single strike against an oil tanker is enough for fear to do the rest of the work. This is the kind of warfare for which Iran is prepared.

As regards protecting the passage of ships from friendly nations, American vessels escort them – particularly oil tankers, which typically cross the Strait of Hormuz at night with their Automatic Identification Systems (AIS) switched off so as not to reveal their position.

A key factor for the US is that drones and missiles (which are used to attack both ships and US military bases and energy infrastructure in the region) must almost always be shot down by anti-aircraft systems, the cost of which can be a hundred times that of the target system (drone or missile) itself – a cost that is neither affordable nor sustainable in the long term. In fact, the conflict is having a serious impact on US anti-aircraft systems' ammunition stocks, which demonstrates the enormous difficulty of managing the threat posed by cheap drones.

The consequences of this dual blockade are clear in the ship traffic data for recent months. Traffic through the Strait of Hormuz initially fell from around 120 ships a day to

¹¹ In the Strait of Hormuz, US Mine Countermeasures (MCM) divers, alongside Navy EOD (*Explosive Ordnance Disposal*) personnel and Navy SEALs, have played a critical and high-risk role in locating, neutralising and clearing Iranian naval mines.

¹² *Financial Times*. *The risky mission to de-mine the Strait of Hormuz*. 6 September 2026. Available at: <https://www.ft.com/content/04031dbe-7412-441e-8aaa-89a9ee6c7439?syn-25a6b1a6=1>

fewer than 10 (Figure 5), and although an agreement was reached in June (allowing for a temporary increase in maritime traffic in the region), its subsequent breakdown led to the resumption of attacks by both sides.

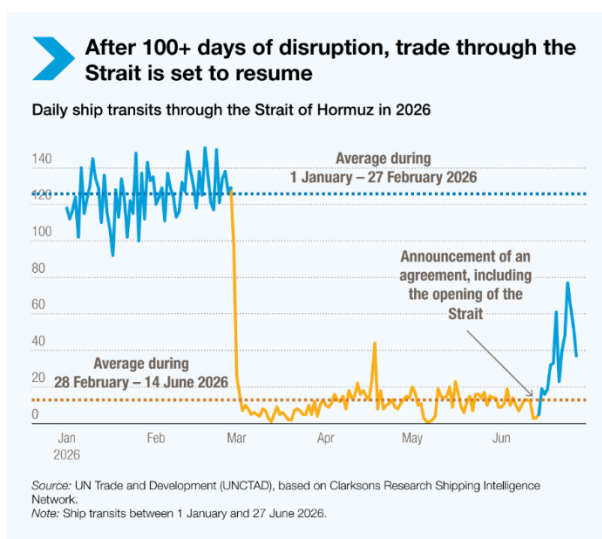


Figure 5. Source: UNCTAD.
<https://unctad.org/es/news/la-reapertura-de-hormuz-puede-calmar-los-mercados->

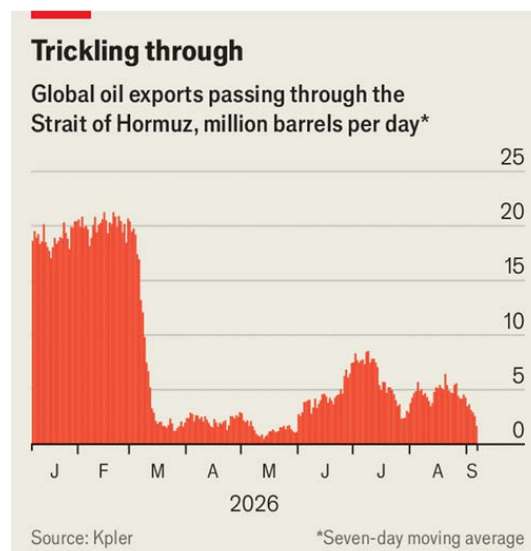


Figure 6. Millions of barrels passing through the Strait of Hormuz since the start of the war.
<https://www.economist.com/middle-east-and-africa/2026/09/09/is-traffic-through-hormuz-really-back-to-normal>

In August, the figure fell again¹³, a trend that continued into September, with oil volumes passing through the Strait of Hormuz at around 5 million barrels per day – less than 25% of the usual volume (Figure 6) – and an average of 15 vessels¹⁴ per day. However, in the final weeks of September and into October, the figures have been rising, and the volume of oil passing through the Strait of Hormuz appears to be approaching levels seen prior to the start of the conflict last February¹⁵. Despite the lack of results from diplomatic channels, ship escorts, preventive mine-clearing operations, and the use of routes close to Oman (shown in yellow in Figure 7) – and therefore further away from Iran – are some of the reasons behind this recovery in the volume of crude oil passing through the Strait of Hormuz.

Changes to the traffic separation scheme in the Strait of Hormuz

Iran's geographical advantage enabled it to attempt to establish a new transit route

¹³ <https://edition.cnn.com/interactive/2026/08/world/strait-of-hormuz-shipping-data-traffic-routes-vis-intl/>

¹⁴ <https://www.imo.org/en/mediacentre/hottopics/pages/strait-of-hormuz-middle-east-data.aspx>

¹⁵ <https://www.kpler.com/es/blog/middle-east-flow-and-disruption-tracker-1-oct-2026>

(shown in red in Figure 7), bringing it closer to its coastline, thereby allowing it to exercise closer control using its drones, missiles and patrol boats, as well as assuring vessels passing through that the waters are mine-free.

Furthermore, with the intention of reducing to some extent the economic sanctions imposed by the United States and its allies, Tehran is using the new facility to attempt to

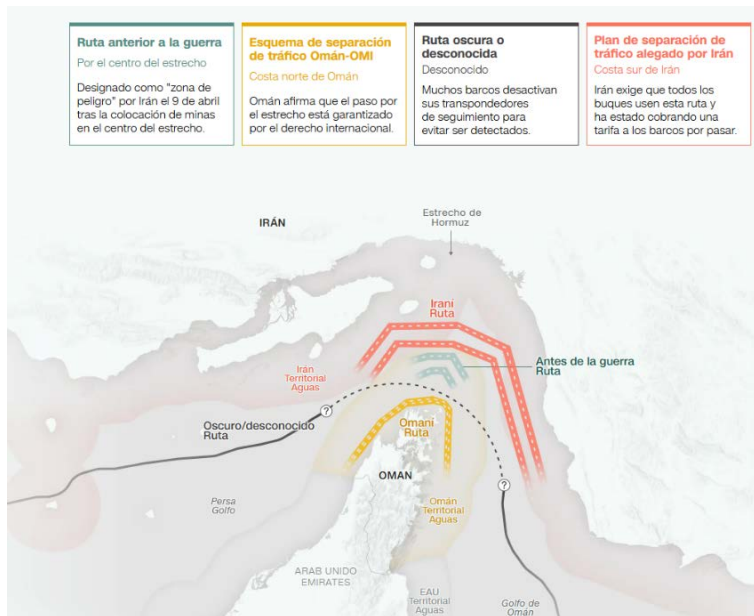


Figure 7. Traffic control measures and routes in the Strait of Hormuz.
Source: CNN Mundo.

<https://edition.cnn.com/interactive/2026/08/world/strait-of-hormuz->

impose a toll for crossing the strait, estimated at \$1 per barrel¹⁶ (to be paid in yuan, thereby bypassing Western financial networks)¹⁷, and in which it is attempting to involve Oman (by sharing the proceeds), although Muscat is under pressure from Washington, its traditional ally, to reject this Iranian initiative¹⁸.

Figure 7 shows the various options currently available for passing through the strait, all of

which are high-risk, as neither side can guarantee the safety of transit. However, the US is protecting the southern section, which is closest to Oman, through which oil tankers pass under the protection and escort of the US Navy.

The situation regarding what is actually happening in Hormuz remains rather unclear, with a war of figures and statements from both sides making it difficult to ascertain in detail whether mines have been laid and where, how many drone attacks are successful, and the actual number of vessels and volume of oil passing through the strait.

¹⁶ If 20 million barrels per day of oil and petroleum products pass through the Strait of Hormuz, this would represent revenue of at least some \$30,000–50,000 million a year, which is vital for the Iranian economy, which has been severely affected by international sanctions.

¹⁷ <https://www.larazon.es/internacional/blindaje-chino-dinamita-asedio-financiero-trump-crudo-irani>

¹⁸ Iran intends to establish new regulations, oversee their implementation, and arrange a (non-equitable) distribution of revenues with Oman. <https://www.forbes.com/sites/guneyyildiz/2026/07/28/hormuz-is-becoming-a-fee-and-permission-regime/>

The (land-based) alternatives to the Strait of Hormuz: oil pipelines

The main characteristic of the Strait of Hormuz is that there is no maritime alternative. The Persian Gulf is effectively a large lake with a single outlet, the Strait of Hormuz, which is why the Gulf states are seeking other options. Saudi Arabia, the region's leading exporter, is using the East-West pipeline that crosses the country from the Persian Gulf to the Red Sea, reaching the port of Yanbu (see Figure 8), with a theoretical capacity to transport between 4 and 5M b/d (million barrels per day), making it a partial land-based



Figure 8. Oil pipelines crossing Saudi Arabia (East-West) and the United Arab Emirates (Habshan–

alternative to the Strait of Hormuz, although, as a fixed piece of infrastructure, it is highly vulnerable. In fact, on 11 September, Riyadh had to temporarily close the pipeline (it reopened ten days later¹⁹) due to damage caused to part of the infrastructure by drone attacks from Iraq carried out by groups (proxies) allied with Iran.

For its part, the UAE is using the Habshan–Fujairah pipeline (see Figure 8), which runs overland to the Gulf of Oman, bypassing the Strait of Hormuz, and is constructing a second pipeline with the aim of doubling the current capacity of 2 million barrels per

day and reaching 4 million b/d within a year²⁰. A recent CSIS report highlights that there are currently seven pipeline construction projects underway to bypass the Strait of Hormuz, which, according to Goldman Sachs' estimates, could increase current capacity by 4 million barrels per day by the end of 2027, and by up to 7 million barrels per day by the end of 2028. Once this infrastructure is completed, the importance of the Strait of Hormuz would be significantly reduced, and along with Iran's²¹ coercive power in Hormuz – its 'ace up its sleeve'. In any case, we must not overlook the vulnerability of oil pipelines

¹⁹ <https://gulffnews.com/business/energy/saudi-oil-lifeline-reopens-aramco-restarts-east-west-pipeline-bypassing-hormuz-1.500684800>

²⁰ <https://www.economist.com/middle-east-and-africa/2026/08/03/how-long-can-iran-weaponise-hormuz>

²¹ <https://www.csis.org/analysis/postwar-threat-gulf-energy-infrastructure>

as fixed land-based installations, given how easily they can be attacked, as Iran has recently demonstrated through its proxies.

In this highly volatile and unstable scenario, in the final weeks of September (2026), the Houthi rebels in Yemen (Iranian proxies) have seized the port of Mocha and the island of Perim²², key positions in the vicinity of the Bab-el-Mandeb Strait, placing them in an advantageous position to control this passage and thus block the passage of Saudi oil tankers leaving Yanbu for Asia via a route that bypasses the Strait of Hormuz.

The option of oil tankers passing through the Suez Canal and circumnavigating Africa en route to Asia is considered highly impractical, both due to the enormous increase in

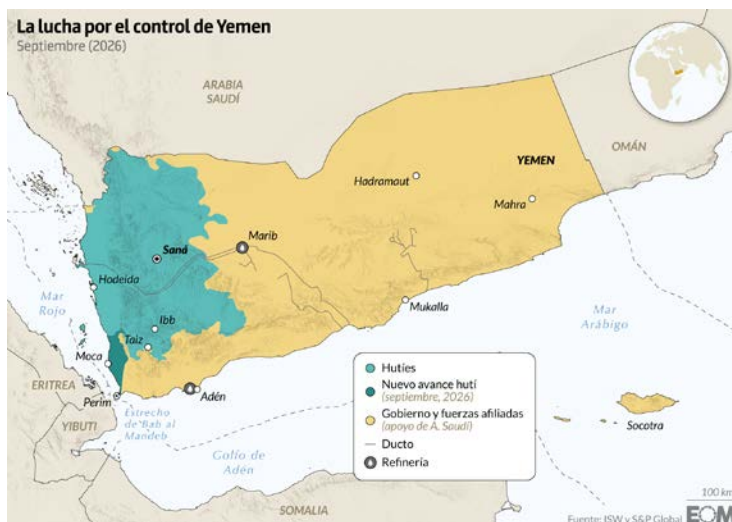


Figure 9. Positions taken by the Houthis in the vicinity of the Bab-el-Mandeb Strait (September 2026).

distance and transit time, and because of the Suez Canal's draught limitations, which, despite recent modifications, remain restricted to 20 metres (Suezmax), thereby preventing the passage of large oil tankers (VLCCs and ULCCs)²³.

Between late 2023 (following the Hamas terrorist attacks on Israel on 7 October) and 2025, the

Houthi rebels managed to reduce maritime traffic through the Red Sea by almost half, with significant economic consequences at both global and regional levels²⁴. Although traffic levels were returning to pre-2023 levels by 2026, these new Houthi initiatives seek to regain prominence in the region, complementing the Iranian blockade of the Strait of Hormuz with potential Houthi control over oil tanker traffic passing through Bab-el-Mandeb.

Despite this threat, overland alternatives (oil pipelines) are helping to transport a

²² <https://elordenmundial.com/mapas-y-graficos/mapa-huties-yemen/>

²³ <https://www.air-shipment.com/new/oil-tanker-classifications-guide-cover.html>

²⁴ The Red Sea accounts for 12 per cent of global maritime traffic and 30 per cent of container traffic (high-value cargo). Houthi attacks caused traffic to fall by more than half for almost two years (in the case of containers, it fell almost entirely, with major shipping companies opting to sail round Africa instead). By September 2026, container traffic had resumed in the Red Sea, but only at 70 per cent of 2023 levels.

significant volume of oil out of the Persian Gulf. According to data from Kpler²⁵ dated 1 October, the total volume of oil and petroleum products leaving the Gulf has been recovering in recent weeks (September), standing at around 20 million barrels per day, 12 million via the Strait of Hormuz (primarily via the southern corridor, running close to the coast of Oman) and the remaining 8 million via the aforementioned pipelines (terminals in the Gulf of Oman and the Red Sea). This brings us figures close to those seen before the conflict, although in a scenario of high uncertainty and volatility; however, it is allowing the price per barrel to remain, with some fluctuations, at around \$100 per barrel.

Hormuz, international law (UNCLOS) and the prohibition on tolls

Under international law, freedom of navigation and the safety of maritime routes are guaranteed by the United Nations Convention on the Law of the Sea (UNCLOS). With regard to straits, the Convention establishes the so-called right of 'transit passage' through international straits or channels²⁶, whereby coastal States may not impede transit or levy charges for crossing them, although they are permitted to establish traffic separation schemes in accordance with international regulations, which they may amend when circumstances require it.

UNCLOS is a treaty that has achieved very broad consensus, having been signed and ratified by 168 countries. However, due to their significance in maritime affairs, it is worth highlighting those countries that have not signed it (the United States, Israel and Turkey, amongst others²⁷), or those that, having signed, have not ratified it (Iran and the United Arab Emirates), the majority of which are involved in the Strait of Hormuz crisis.

It is a fact that the vast majority of countries, even those that have not signed, recognise the rules relating to transit passage as customary law. However, as with all international law, when a coastal State does not wish to comply with the rule, it is very difficult to compel it to do so. It is worth noting that Oman, which ratified UNCLOS in 1989, is considering Iran's toll proposal, contrary to the provisions on 'transit passage', although, on the other hand, it is under pressure from its American ally to reject it.

²⁵ <https://www.kpler.com/es/blog/middle-east-flow-and-disruption-tracker-1-oct-2026>

²⁶ Articles 37 to 45 (both inclusive).

²⁷ The US has not signed UNCLOS, primarily due to its disagreement with the provisions on seabed management – in particular mining – and on the powers of the International Seabed Authority (ISA).

Agreeing to pay a toll, compensation, contribution or whatever metaphorical term one might use to describe the collection of a sum of money for crossing the Strait of Hormuz would constitute a clear breach of a widely accepted norm of international law and would set a very negative precedent, as the governance of the world's major maritime routes could shift from a rules-based regulatory framework (UNCLOS, and in this case the 'right of transit passage'²⁸) which expressly prohibits the collection of tolls to one shaped by strategic influence and power asymmetries²⁹.

This would effectively represent a breakdown of the rules governing maritime traffic and freedom of navigation, which could prompt coastal states at other chokepoints, such as the Strait of Malacca, to attempt to implement similar initiatives. Proof of how important this is to the US (even though it has not signed UNCLOS) and its Western allies is that the final declaration of the Ankara Summit (NATO) – comprising just five points – devotes one of them to making an explicit reference to freedom of navigation in the Strait of Hormuz³⁰.

Those most likely to accept this solution as the lesser of two evils are the shipping companies³¹, as the cost would be manageable in relation to the value of the cargo, thereby providing security and stability for passage through the Strait of Hormuz. Although insurance premiums vary enormously depending on the attacks, companies such as Lloyd's³² continue to insure ships in the current situation, albeit at costs that have risen exponentially, from 0.25% of the ship's value before the war to between 7.5% and 10%³³ (which significantly increases the price of oil at its destination).

SITUATION IN THE STRAIT OF HORMUZ AND ITS POSSIBLE CONSEQUENCES

The Strait of Hormuz serves as yet another reminder of just how stubborn and influential – though not always decisive – geography is. In the current conflict between the US and

²⁸ UNCLOS, Articles 37–44. https://www.un.org/Depts/los/convention_agreements/texts/unclos/convenmar_es.pdf

²⁹ <https://researchcentre.trtworld.com/publications/analysis/the-price-of-passage-irans-hormuz-strategy/>

³⁰ <https://www.nato.int/en/about-us/official-texts-and-resources/official-texts/2026/07/08/the-ankara-summit-declaration>

³¹ Large oil tankers carry between 1 and 2 million barrels of oil, so the cost of the toll would be around \$1 per barrel, which would be economically feasible, though not politically or legally so.

³² <https://beinsure.com/news/lloyds-keeps-hormuz-cover-available-as-war-risk-rates-jump/>

³³ By way of example, as at 5 August, for a VLCC (*Very Large Crude Carrier*) valued at \$138 million, the premium has risen from \$0.345 million to between \$10.3 million and \$13.8 million, according to Lloyd's. Available at: <https://edition.cnn.com/interactive/2026/08/world/strait-of-hormuz-shipping-data-traffic-routes-vis-intl/>

Israel on one side and Iran on the other, the strait is taking centre stage due to its impact on the global trade in gas and oil.

In fact, Iran's first move, in response to the attacks that began on 28 February, was to attempt to close the Strait of Hormuz – its 'ace up its sleeve' – thereby causing increased uncertainty in the energy markets, on the shipping routes themselves, and consequently in global finance.

Some economic consequences

Crude oil prices have risen by around 50% since the start of the conflict, although they have remained relatively stable at around \$100 per barrel, which, whilst worrying, is not critical³⁴.

This rise in energy prices is fuelling inflation, to which the natural response of central banks is to raise interest rates, thereby cooling the economy. Although the impact is global, the effects are uneven, being more severe in developing and less developed countries (Asia and Africa), where there is also a significant impact from the sharp rise (up to 40%) in the price of fertilisers (a third of global maritime trade in fertilisers leaves the Persian Gulf via the Strait of Hormuz), with the consequent impact on agriculture and on potential famines³⁵.

In its latest report³⁶ (September 2026), UNCTAD estimates that growth in developing economies will fall from 4.7% in 2025 to 4% in 2026, whilst global growth is projected at 2.6% compared with 2.9% in 2025. Whilst energy dependence is not the only factor, it is a key element in this trend. At the European level³⁷, inflation reached 3.8% in September 2026, almost two percentage points higher than a year ago, with energy being the main driver of this rise.

In the Gulf states, the World Bank estimates³⁸ that the region's GDP will contract by -2.1%, in contrast to the projected growth of up to +3.6% prior to the start of the conflict. The UAE and Saudi Arabia are expected to go from 6.2% and 4.6% in 2025 to -1.6% and

³⁴ https://unctad.org/system/files/official-document/osginf2026d3_en.pdf

³⁵ https://unctad.org/system/files/official-document/osgtinf2026d1_en.pdf

³⁶ <https://unctad.org/publication/trade-and-development-report-2026>

³⁷ <https://ec.europa.eu/eurostat/web/products-euro-indicators/w/2-02102026-ap>

³⁸ <https://www.thenationalnews.com/business/economy/2026/10/06/world-bank-says-middle-east-economy-to-contract-21-in-2026-on-iran-war/>

-2.0% respectively in 2026. Qatar, at -21%, and Kuwait, at -14.6%, would be the hardest hit this year. Iran, for its part, would fall from the forecast 3.8% to -12.4%.

The US and Iran's military approaches to the Strait of Hormuz crisis

It is undeniable that the United States remains the great maritime power, exercising naval power on a global scale. It is the only country with the potential 'capacity' to exercise 'control of the seas', which means ensuring freedom of navigation and keeping maritime shipping routes secure.

However, in this instance, the way in which the US is projecting its naval power is not proving entirely effective. It has achieved significant tactical successes, but has failed to control the Strait of Hormuz or maintain freedom of navigation. It faces an adversary that views the conflict as existential, which has geography on its side, and which possesses the capacity to bear almost disproportionate costs.

Iran's secret weapon is its low-cost military capabilities (drones, missiles, mines, etc.), which are abundant, dispersed and deployed with remarkable mobility. They are effective because not only are they difficult to destroy individually, but the cost of doing so exceeds the value of what is destroyed by orders of magnitude. Iran has been preparing for this situation for decades, with a decentralised military structure, dispersed weapons storage, and mobile drone launchers, in what was termed 'Mosaic Defence'³⁹ by the then leader of the Islamic Revolutionary Guard Corps, Ali Jafari.

And all this is taking place in a rugged and difficult-to-attack geographical area, dominated by the defender, which not only makes an amphibious (military) landing on its shores inadvisable, but also significantly reduces the effectiveness of a conventional air campaign (the US has dropped enormous quantities of munitions from the air, with very limited tangible results).

The mathematics of attrition – the costs of an asymmetric conflict at a chokepoint – tend to favour the defender as time passes and the conflict drags on. The US is in a hurry, but Iran is less so, as long as it can hold out. For Tehran, maintaining the status quo is a victory, as long as it endures and does not collapse (although its economic and social situation is very complicated). It does not need to defeat the US; it simply has to ensure

³⁹ <https://global-strategy.org/clave-resistencia-irani/>

the conflict drags on and hold out; to inflict costs that Washington cannot bear, forcing it to withdraw or bring the conflict to an end on unfavourable terms.

In the long term, and if it manages to hold out, the current reopening of the Red Sea front by the Houthi rebels would allow Tehran to aspire to a situation that is, at the very least,

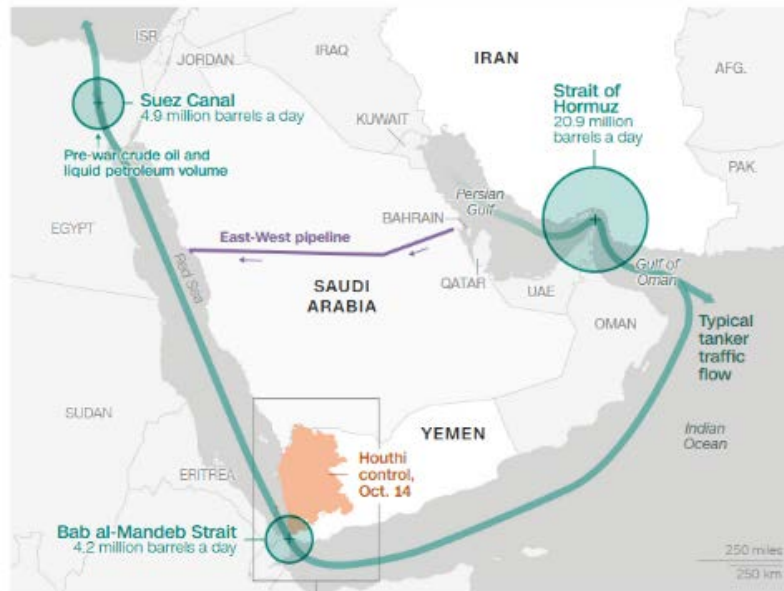


Figure 10. Shows the chokepoints, Hormuz and Bab-el-Mandeb, which could be controlled by Iran and the Houthis respectively. Source: footnote 39.

intimidating: controlling the Strait of Hormuz, whilst its Houthi allies (proxies) control Bab-el-Mandeb⁴⁰, considered to be Iran's second front⁴¹.

One reality that leaves little room for doubt is that as long as the US does not land troops on the coast of Hormuz or put boots on the ground⁴² (which it is unlikely to do), Tehran will be able to maintain control of Hormuz

(even if it is negative control), illustrating the gap between carrying out air strikes and eliminating the threat. Geography is always a factor, and it is clear that the islands and the Iranian coastline north of the Strait of Hormuz form a natural military stronghold, combining favourable geography with a doctrine that exploits that advantage.

Washington already had a plan to seize the Strait of Hormuz and its islands in the 1980s, which estimated that at least 6,000 marines would be required⁴³. Today, with drone technology, it would be somewhat reckless to attempt an amphibious landing on the inaccessible islands and northern coast of the Strait of Hormuz, where the number of casualties would likely be unacceptable to American society. Furthermore, it would be

⁴⁰ <https://edition.cnn.com/2026/10/17/economy/us-iran-war-shipping-trade-hormuz-bab-el-mandab-strait-intl>

⁴¹ Alley, A. L. and Minor, A. 'Iran's Second Front'. Foreign Affairs, 11 September 2026. Available at: <https://www.foreignaffairs.com/yemen/irans-second-front>

⁴² Securing the strait would require large-scale ground operations, the elimination of launch sites and the securing of an extensive coastal strip. It would require ground troops, take months to execute and expose those troops to Iranian attacks.

⁴³ <https://www.elmundo.es/internacional/2026/03/18/69ba9eaafdddf4b638b458b.html>

difficult to sustain, both in terms of troop numbers and logistics, holding the position over time under the constant threat of Iranian military forces.

The collapse of the Ayatollahs' regime, essentially through economic means, is the main course of action for the US, although it is currently unclear whether achieving this objective is within reach. Iran, although greatly weakened, enjoys – amongst other things – the (tacit) support of China and, to a certain extent, Russia, both of which have an interest in a protracted conflict, thereby wearing down the United States.

Situation in October 2026: instability continues, but crude oil exports from the Persian Gulf are recovering

After more than six months of conflict, the situation in the Strait of Hormuz remains deadlocked, with no significant progress and no prospect of a diplomatic solution in the short term. Although the mutual blockade between Iran and the US continues, in recent weeks Washington has been managing to restore the flow of oil to levels close to those seen before the conflict began.

Consequently, the US is using the southern part of the Strait (a route close to the coast of Oman) for the passage of large oil tankers during the night, escorted and protected by American vessels, and usually with their automatic identification systems (AIS) switched off. Once they have crossed the Strait of Hormuz, they transfer their cargo to other tankers waiting in the Gulf of Oman (*STS – Ship to Ship*) for subsequent global distribution. These operations are carried out using a small number of large-capacity vessels, which leave, transfer their cargo, and re-enter the Persian Gulf, repeating the process⁴⁴: they enter and leave continuously⁴⁵, escorted by US Navy vessels.

This, combined with the use of onshore oil pipelines (Saudi Arabia via the Red Sea, and the UAE via the Gulf of Oman; see Figure 8), is currently enabling the volume of crude oil leaving the Persian Gulf to increase, approaching pre-conflict levels (see Figure 11), despite the fact that the official number of vessels crossing the Strait remains at very low levels. This fragile 'current normality' does not depend on agreements, but on the operators' willingness and ability to navigate in a hostile environment⁴⁶.

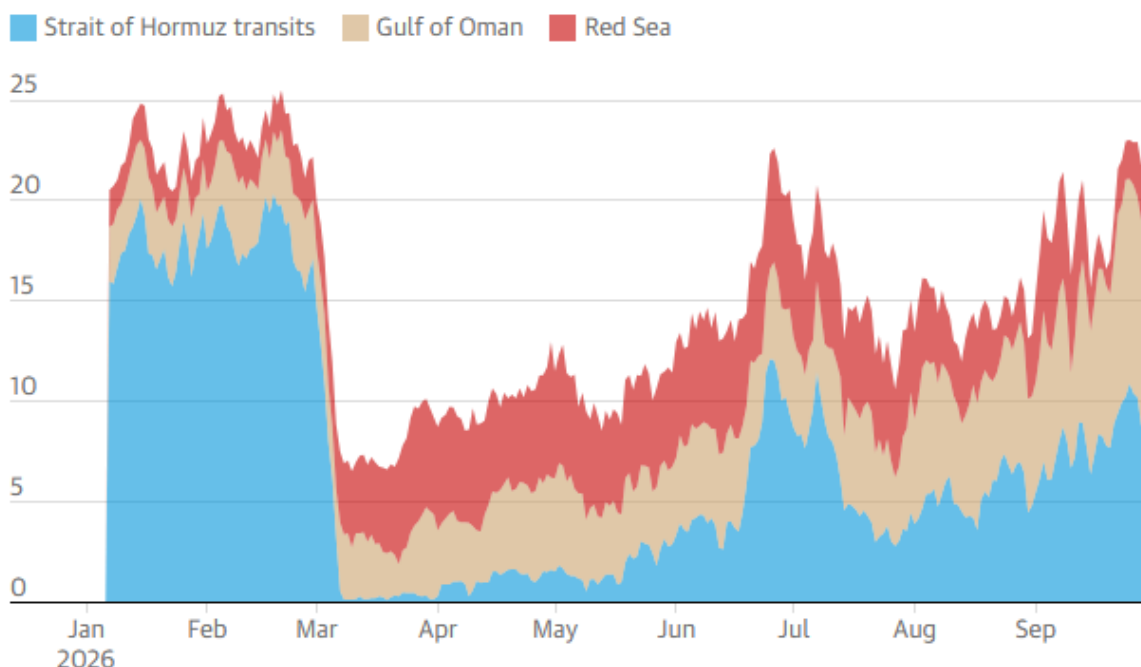
⁴⁴ <https://www.elmundo.es/internacional/2026/10/22/6ada2b0ae85ece1e598b4590.html>

⁴⁵ <https://www.elmundo.es/internacional/2026/10/23/6ad9d425fdddfef108b4577.html>

⁴⁶ <https://www.elmundo.es/internacional/2026/10/11/6ac8e7dbe85ece93398b4599.html>

Daily Middle East oil exports

Net million barrels per day, seven-day rolling average



Guardian graphic. Source: Kpler. Note: Gulf of Oman data includes ship-to-ship transfers and terminal loadings

Figure 11. Changes in the routes for oil exports from the Persian Gulf during the current conflict.

All this implies a significant loss of influence for Iran in controlling the Strait⁴⁷, which, moreover, is unable to get its oil through due to the US naval blockade. This forces it to attempt to step up its offensive actions, although its capabilities to do so have been severely degraded by US attacks.

Thus, this increase in oil flow is taking place against a backdrop where attacks on ships continue to occur almost daily, by both the US and Iran, mainly involving drones and missiles, although the Islamic Revolutionary Guard Corps⁴⁸ claims that ships have struck naval mines (unconfirmed).

⁴⁷ <https://edition.cnn.com/2026/09/29/economy/oil-strait-of-hormuz-iran>

⁴⁸ <https://www.iranintl.com/en/202610100347>

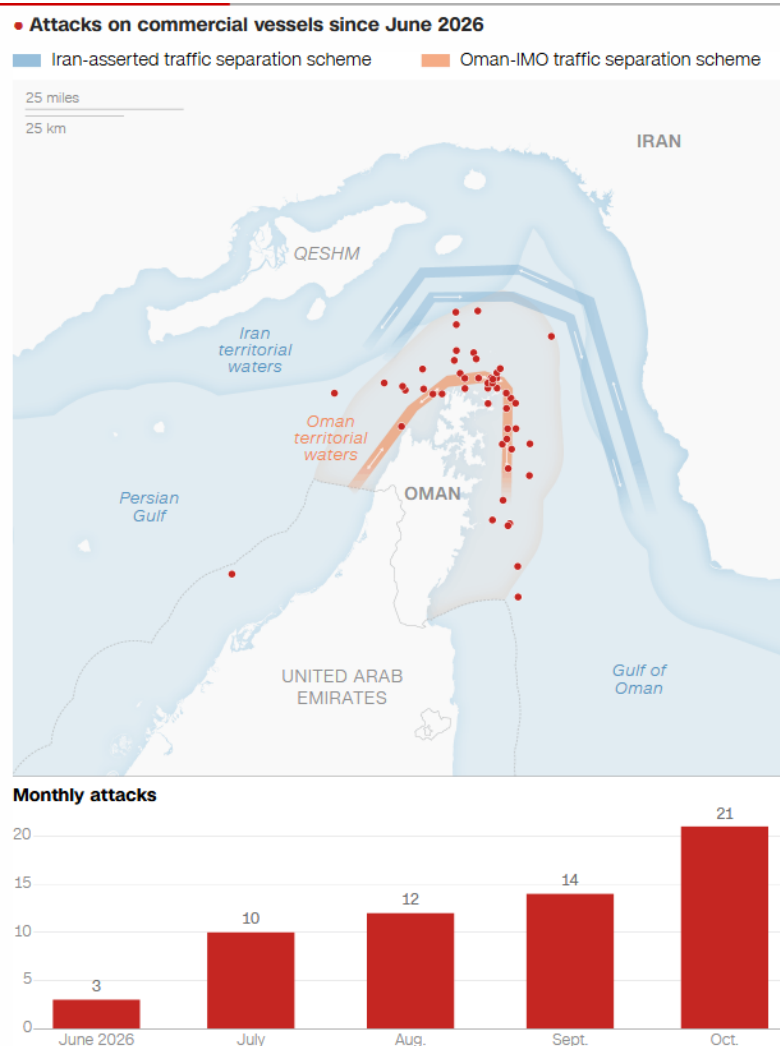


Figure 12. Attacks on ships in the Persian Gulf, the Strait of Hormuz and the Gulf of Oman since June 2026. Source: <https://edition.cnn.com/2026/10/15/middleeast/strait-of-hormuz-ships-sunk-iran-intl-hnk>

Figure 12 illustrates this Iranian response, showing a significant increase in the number of attacks in recent weeks⁴⁹ (more than 20 in the first half of October), some of which have resulted in the sinking of vessels (experts believe this was caused by drones rather than mines, as claimed by Iranian sources).

It is undeniable that the US is deploying enormous resources in the region with the aim of restoring the flow of hydrocarbons through the strait, and of maintaining the blockade to prevent ships with Iranian interests from crossing it.

The presence of at least two⁵⁰ carrier strike groups (CSGs)

in the region over recent months, as shown in Figure 13, gives us an idea of the enormous naval effort the United States is making to prevent or limit Iranian control of Hormuz, at the cost of leaving other global maritime theatres of interest under-defended.

⁴⁹ <https://news.usni.org/2026/10/09/october-sees-near-daily-strikes-on-ships-in-hormuz>

⁵⁰ The US usually has three or four CSGs permanently deployed across various maritime theatres. It normally has two in the Western Pacific, carrying out naval presence and sea control tasks in response to China's maritime, commercial and naval expansion. For the past six months, it has had at least two CSGs deployed in the northern Indian Ocean, near the Gulf of Oman, to the detriment of the Western Pacific, its priority area of interest.



Figure 13. Deployment of US Navy Carrier Strike Groups (CSGs) and Amphibious Ready Groups (ARGs) around the world. 19 OCT 26. Source: <https://news.usni.org/2026/10/19/usni-news-fleet-and-marine-tracker-oct-19-2026>

At the time of writing this analysis⁵¹, the situation in the Strait of Hormuz appears to be gradually shifting in favour of the US, with a recovery in the flow of traffic out of the Persian Gulf and a certain loss of control by Iran over the situation in the Strait; Iran is unable to ensure that its own vessels can pass through safely, nor is it able to prevent the transit of vessels escorted by the United States.

However, uncertainty remains: on the one hand, due to the enormous military effort being made by the US, which does not appear to be sustainable in the long term; and on the other, in relation to the growing risk of Iran's economic collapse (with a projected 15% loss of its GDP by 2026), which could clarify the situation and force it to accept a deal that is unfavourable to its interests.

The stance of third-party actors

Some analysts argue that Iran's objective is not to defeat US naval and air power – which it knows to be impossible – but rather to convince commercial players that the US no longer has the capacity to guarantee security on maritime routes and in the region.

⁵¹ This analysis is dated 24 October 2026.

The alliance between Turkey, Saudi Arabia and Pakistan – the 'Mecca Pact' signed on 7 August, a sort of Islamic NATO – is clear evidence of this⁵².

In this Hormuz crisis, the stance of external actors is of particular interest, especially those from Asia (Figure 3), who are the hardest hit by the reduction in the volume of hydrocarbons leaving the Persian Gulf.

China, although heavily affected (it used to receive just over 5 million barrels per day from the Gulf), is managing its energy dependence effectively. It has diversified its suppliers and is managing its reserves wisely. Its dependence on the Persian Gulf accounts for less than 50% of its total import requirements (around 12 million barrels per day), whilst Japan and South Korea rely on oil from the Gulf for between 60 and 70% of their needs.

China maintains a low-profile stance, although it should not be forgotten that it is an ally of Iran (which joined the SCO in 2023 and the BRICS+ in 2024, strengthening its ties with China within a multipolar vision).

Furthermore, as a major trading power and, in effect, the world's factory, China requires secure maritime routes. Iran's aspirations to impose tolls in the Strait of Hormuz run counter to China's global interests, as it needs this 'freedom of navigation' – which is vital to its economy – and currently lacks the capacity to guarantee it. The US remains the hegemonic maritime power, with the naval capability for 'control of the seas' – a position that China appears to intend to challenge in the future⁵³, particularly in its neighbouring seas, and for which it has been trying for years to create the conditions to do so.

Furthermore, China is a privileged observer of events in the Strait of Hormuz. It is watching as US ammunition stocks⁵⁴ are depleted (both in attacks on Iranian facilities and in shooting down cheap drones or missiles using state-of-the-art systems), whilst analysing US capabilities in multi-domain conflicts. It is also learning from Iran's strategy in the Strait of Hormuz, which Taiwan could apply in the event of a possible Chinese

⁵² <https://www.foreignaffairs.com/united-states/iran-and-new-rules-global-power-pape>

⁵³ Romero, A. *Port Power: A Key Element in China's Maritime Rise*. IEEE, analysis paper 19/2026, 4 March. <https://www.defensa.gob.es/ceseden/-/ieee-2026-poder-portuario-ascenso-maritimo-china-analisis19>

⁵⁴ This could affect US military capabilities in any future action in the South China Sea.

invasion or attack from the mainland⁵⁵.

Russia is arguably the biggest beneficiary of the situation in the Strait of Hormuz, as the news and constant statements are dominating the headlines at the expense of the war in Ukraine. Added to this is the fact that high oil prices, in a market suffering from shortages, make Russia an irreplaceable player. The recent and controversial agreements between Trump and Putin regarding the sale of Russian diesel⁵⁶ (in breach of international sanctions on Russian oil) to reduce fuel prices ahead of the elections of 3 November are a clear example of this new, more pragmatic world order, where principles and values take a back seat to interests.

Furthermore, Russia and Iran are, to a certain extent, allies of convenience who support one another in their respective conflicts. It appears that Moscow is providing Tehran with intelligence that may facilitate Iran's retaliatory actions against countries in the Persian Gulf, whilst Iran may be supplying low-cost drones to Russia for use in the war with Ukraine, possibly via the Caspian Sea (which is difficult for external actors to control). Furthermore, within this complex equation of intersecting interests, it is significant to note that Ukrainian experts in shooting down⁵⁷ (Iranian) drones have been deployed to countries in the Persian Gulf with the aim of supporting them in their defence against Iranian attacks.

Finally, it is worth noting the stance of European countries, which have not become involved either in the wider conflict in Iran or in the Strait of Hormuz in particular, much to the obvious displeasure of the US. Although High Representative Kallas has stated that Iran's war is not Europe's war, the situation in the Strait remains a cause for concern. Although it receives less than 5% of the oil exported from the Persian Gulf, the fact that energy prices are global means that Europe is suffering the consequences of the situation at the mouth of the Persian Gulf (inflation in 2026 will be double that of 2025).

However, the main concern for Europe is freedom of navigation, which is also vital to its commercial interests. Consequently, the aim is to maintain the EUNAVFOR ASPIDES

⁵⁵ A defence system using low-cost drones and missiles launched from Taiwan's rugged and easily defensible western coast (the geography initially favours Taiwan) could overwhelm the defence systems of Chinese ships approaching the island in a hypothetical amphibious landing attempt.

⁵⁶ <https://www.economist.com/europe/2026/10/12/donald-trump-is-again-threatening-to-cut-off-arms-to-ukraine>

⁵⁷ <https://www.nytimes.com/2026/03/18/world/middleeast/ukrainian-experts-in-middle-east-fight-drones.html>

maritime security operation⁵⁸ in the waters of the Red Sea (with results that are, to say the least, very limited), as well as possibly launching a mission to keep the Strait of Hormuz open once the conflict has ended (the United Kingdom, France and other European countries). No action is expected whilst the conflict is ongoing, which leads us to believe that Europe is, to a certain extent, caught between economic anxiety and geopolitical irrelevance.

In view of the above, it seems reasonable to consider that an Asian mission would be more justified than a European one as, in addition to being the hardest hit by the situation, it would be perceived as being more neutral. The reality is that Asian countries possess greater military capabilities than their European counterparts, but their diplomatic framework is fragmented, and their approach to multilateralism is very limited. By way of example, India, which has been adversely affected by the crisis, is implementing its own strategy by deploying warships as far as the Gulf of Oman, but is doing so unilaterally, without coordinating with third parties.

How the situation might develop in the coming weeks/months

Whilst Iran cannot completely block the Strait of Hormuz, the United States cannot fully open it either. As Haass and Kissane point out⁵⁹, half a year of military attacks and economic coercion has failed to persuade Iran (and its proxies) to make concessions, and there is no reason to believe that US threats will cause them to change their behaviour. Nor does it seem possible for the US and its allies to protect the region's energy infrastructure and crude oil shipments through the Strait of Hormuz (and via pipelines) indefinitely from the threat posed by Iran and its proxies.

The economic and military costs of the conflict are becoming unacceptable, which leads us to consider that the least bad option would be to return to diplomacy. Although a negotiated agreement might carry a political cost for the current US administration, an end to the war and a fall in fuel prices would be met with relief in the US and across most of the world, except in some parts of the Middle East where they would face an Iran that remains undefeated and is therefore emboldened.

⁵⁸ https://www.eeas.europa.eu/eunavfor-aspidex_en?s=410381

⁵⁹ <https://www.foreignaffairs.com/iran/stalemate-iran-not-sustainable>

Stephen Walt⁶⁰ reminds us that, when it comes to wars in the Middle East, America's track record is rather negative (Iraq 2003, Afghanistan, etc.). Whilst Washington fights for less vital objectives, its opponents tend to be more determined as they have far more at stake; in the case of Iran, the current conflict is existential. In such scenarios, the weaker side does not usually win through military victory, but by waiting for the stronger power to realise that investing troops and money in a quagmire is not worth it.

Iran, for its part, continues to pursue a strategy of maximum pressure: escalation and sustained offensive action, seeking to damage the global economy and, in particular, that of the regional partners of the US. Tehran's ultimate objective is to make Washington's continued presence in the region too painful to sustain, thereby forcing it to yield and accept a degree of Tehran's control over the Strait of Hormuz, as well as to recognise Iran's status as a major regional power. It appears that Iran is prepared to stay the course, to hold out, and to continue the fighting until it achieves this⁶¹.

The classic concept of 'victory' means achieving the political objectives for which one went to war, but that of 'military victory' has other implications. It means that objectives are achieved on the battlefield rather than at the negotiating table. The idea of military victory is a dangerous myth⁶².

All modern wars end in negotiated settlements, which are not really the second-best option but the only real option. Winning a war requires offering the 'losers' a more favourable outcome than continued resistance. In the case of this conflict, expectations of a military victory have left the administration without any serious planning for negotiations, which will ultimately be inevitable⁶³.

The enormous military effort required by the current situation in the Strait of Hormuz, coupled with the fact that for most Americans the only visible cost of the conflict is inflation, will probably force the US to return to a diplomatic solution sooner rather than later (within weeks). Iran, despite its enormous capacity for resistance and resilience (both of the regime and of its own population, which, although it does not support the Islamic Republic, has seen its anger towards the government overshadowed by its anger towards

⁶⁰ <https://foreignpolicy.com/2026/08/05/iran-trump-lost-wars-us-military-history-strategy-geopolitics/>

⁶¹ <https://www.foreignaffairs.com/united-states/why-iran-escalates>

⁶² <https://www.foreignaffairs.com/united-states/myth-military-victory>

⁶³ *Ibid.*

Washington⁶⁴), will be forced to consider this, and possibly without setting maximum objectives.

Washington does not appear capable of overthrowing the Islamic Republic, nor of forcing it to abandon its nuclear programme, nor of making it cease supporting its proxies, nor of making it relinquish control of the Strait of Hormuz (although it may lose it temporarily), and Tehran lacks the capacity to force the US to leave the region, or to stop it from using its coercive economic and military tools. The war is demonstrating that neither side can deal a decisive blow to the other at an acceptable cost, and unchecked hostility is becoming too costly and dangerous. Washington has made peace with its adversaries before, such as with China in the 1970s, or with Vietnam⁶⁵.

IN CONCLUSION

The current conflict over control of the Strait of Hormuz once again highlights the enormous influence of geography on geopolitics and international relations.

In this case, geography clearly favours Iran which, despite being a power with military strength far inferior to that of the US, possesses low-cost drones and missiles, naval mines and radio systems, giving it a certain capacity to block and control the Strait of Hormuz⁶⁶, or at least to exert influence, demonstrating how a middle-power nation can dictate terms regarding 20% of the world's oil supply.

At the start of the conflict, the United States assessed that by destroying Iran's surface fleet, it would eliminate Tehran's ability to close the Strait, a strategy complemented by sanctions and economic pressure aimed at strangling the regime. This dual approach – military and economic – has not yielded the results Washington had hoped for during the first six months of the conflict, as Iran had spent decades developing a doctrine of asymmetric warfare aimed at exploiting the vulnerabilities of conventional US forces, relying entirely on its geographical advantage, and without needing a traditional navy to block the Strait of Hormuz.

⁶⁴ <https://www.foreignaffairs.com/iran/irans-theory-victory>

⁶⁵ <https://www.foreignaffairs.com/united-states/america-and-irans-strange-moment-opportunity>

⁶⁶ De Aristegui, G. *Hormuz: there is no longer freedom of the seas; there is a toll*. La Razón, 26 July 2026. https://www.larazon.es/internacional/hay-libertad-mares-hay-peaje_202607266a65864dda3add27d4e2be23.html

The aim was to maintain pressure in the Strait whilst avoiding a direct confrontation, thereby prolonging a situation which, if sustained, works in its favour (simply holding out is already a victory for Iran), in a scenario of naval confrontation which it knows it is not prepared to win⁶⁷.

Conversely, Iran also believed it could bring Trump to heel through economic means (inflation and the unacceptable rise in fuel prices for American society), all within an increasingly complex scenario, against the backdrop of an existential conflict for the Tehran regime, which, moreover, as it grows ever weaker, is attempting to compensate through radical measures⁶⁸.

The ability to close the Strait of Hormuz is Tehran's 'ace up its sleeve': it was, and remains, Iran's most important security guarantee in the conflict; the most enduring, the most credible, and, moreover, more immediately deployable than a nuclear deterrent. Marco Rubio himself stated that the Strait of Hormuz had become Iran's economic nuclear weapon due to its capacity to disrupt the world's energy markets⁶⁹.

The situation has prompted a reaction from the Gulf states, which, amongst other measures, are significantly expanding their pipeline infrastructure to avoid, at least partially, transit through the waters of the Strait of Hormuz, thereby reducing its strategic importance.

After several months, the US is managing to restore the flow of crude oil leaving the Persian Gulf to levels close to those seen before the conflict, by using large, escorted oil tankers that pass through the Strait of Hormuz at night, combined with intensive use of the available pipelines.

Geography is once again proving to be a factor of enormous influence in crises⁷⁰, particularly maritime ones. As Josep Baqués reminds us⁷¹, geography is the variable that explains geopolitics, and which also influences the strategies of the various actors (geostrategy), but does not determine them. As there is no maritime alternative to the Strait of Hormuz, the strategy of the Gulf states on the geopolitical chessboard of the

⁶⁷ <https://www.foreignaffairs.com/iran/irans-new-grand-strategy>

⁶⁸ *Foreign Affairs. Iran and the new rules of global order*. 24 July 2026.

⁶⁹ <https://www.foreignaffairs.com/iran/iran-won-war-may-lose-peace>

⁷⁰ <https://www.foreignaffairs.com/united-states/limits-american-power-william-mcraven>

⁷¹ Baqués, J. *How the World Works*. Tirant lo Blanch, Barcelona, 2023.

Middle East, in relation to their neighbour Iran, is shifting towards building a land-based alternative to the Strait of Hormuz via oil pipelines. Whilst acknowledging the vulnerability of fixed infrastructure, this at least adds another option (alternative and complementary) for the export of crude oil from the Gulf.

From a more global perspective, the conflict in the Strait of Hormuz is a true reflection of the ongoing shift in the world order, in which a regional (middle) power such as Iran, with the support of Russia and, more covertly, China, is attempting to 'revise' the international order that has been in place for decades, particularly in the maritime sphere. With a geography that works in its favour, it is seeking to 'control' and 'restrict' freedom of navigation through the Strait of Hormuz as it sees fit, to challenge US control of the sea at that point, and to challenge norms of international law such as UNCLOS, which not only guarantee free passage through international straits but also prohibit the imposition of tolls for doing so.

*Abel Romero Junquera**
Navy Captain (res.)
IEEE Analyst