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Strait of Hormuz and the 2026 Iran Crisis

Introduction

Control over strategically important maritime communications and straits has always mattered for both national and international security. They connect states with other regions, as well as ensure the development of world trade; a significant part of vital goods for living are transported by sea, including energy resources, food, and industrial raw materials, on which the stable functioning of the global economy depends. Even with developments in technology and the development of alternative transport routes, many sea straits still retain their exceptional geopolitical significance. A lot of major trade flows pass through them, for example, oil and natural gas supplies from the Persian Gulf countries. Therefore, any security violations on these routes can affect not only the economic stability of an individual state, but also the international system as a whole. In this regard, it becomes clear that sovereign states and the international community must ensure the safety of maritime communications.

There are several straits of special strategic importance in the world. These include the Straits of Malacca and Bab el-Mandeb, the Strait of Gibraltar, the Bosphorus and the Strait of Hormuz. The most important maritime transport corridors pass through them, the closure of which can have the most negative consequences for the movement of trade, energy, and military flows. But the purpose of the article is to focus specifically on the Strait of Hormuz.

Hormuz's geographical location connects the Persian Gulf with the Indian Ocean and provides transportation of a significant part of the world's energy resources. According to U.S. Energy Information Administration (EIA), oil flow through the strait averaged 20 million barrels per day (b/d), or the equivalent of about 20% of global petroleum liquids consumption (2025). Because of its large share, any threats to navigation's freedom in the region inevitably acquire an international character and go far beyond the regional conflict.

The events of 2026 made this dependence more visible. After the military escalation involving Iran, Israel, and the United States, the Strait of Hormuz has once again become the focus of international attention. The United Nations Conference on Trade and Development (UNCTAD) report highlights that "the resulting ripple effects go far beyond the region, affecting energy markets, maritime transport and global supply chains" (2026, p. 2). The consequences have spread far beyond the Middle East, affecting the functioning of the global economy.

Overall, the events of 2026 raise a bigger question: why does such a small area have so much influence over states behavior and the development of international crises? Hormuz shows that strategic geography continues to shape

international politics. This paper argues that the crisis has once again demonstrated the role of the Strait of Hormuz as one of the key geopolitical hubs of the modern world. Its importance comes not only from the significant volumes of global energy supplies that pass through it, but also through its location, influence on regional security, diplomacy, and ability to influence policy of states during instability.

Understanding the Strategic Importance

The strategic importance is formed by economic, geographical, and military-political factors. From an economic perspective, a very noticeable part of world trade of oil and gas passes through it. Geographically, it is a narrow strait, making it very hard to find alternate equal water passageways. Finally, in military and political terms, the strait gives states located next to it the opportunity to influence freedom of navigation and decisions of other countries. Thus, the strategic importance of the Strait of Hormuz is determined by a combination of geographical, geo-economic, military-political and logistical factors.

The Strait of Hormuz runs between Iran and Oman, connecting the Persian Gulf with the Gulf of Oman and the Arabian Sea. Thus, the Strait is considered to be the main access to world markets for most states of the Persian Gulf. At its narrowest point, the Strait is 21 miles wide, but the width of the shipping lane in either direction is only two miles, separated by a two-mile buffer zone (EIA, 2012). The Strait is deep and wide enough to handle the world's largest crude oil tankers, with about two-thirds of oil shipments carried by tankers in excess of 150,000 deadweight tons (EIA, 2012). Such a system makes it possible to streamline the movement of tankers in peacetime, but still makes the strait especially vulnerable in times of crisis. Since the ships there have a clear pre-prepared schedule, a certain transport corridor, maneuvering, choosing an alternative route after such planning is difficult and almost impossible. Indeed, even if there is an accident, for example, its deliberate blocking or damage to the port infrastructure, it can significantly reduce the ability of other vessels to move. Even though several alternatives are potentially available to move oil from the Persian Gulf region without transiting Hormuz, they are limited in capacity, in many cases are not currently operating or operable, and generally engender higher transport costs and logistical challenges (EIA, 2012). Hence, narrowness brings more vulnerability both militarily and politically. To disrupt navigation even just a limited attack, threat or force can slow down the movement of ships and cause international consequences.

The location of the coastline and islands around the strait is of additional importance. Iran occupies the northern coast of Hormuz and controls a number of islands located near the main shipping routes. As highlighted in *The Strategic Importance of the Strait of Hormuz and Its Impact on the Iranian-American Conflict*, "such a location gives Iran a comparative advantage that the United States lacks" (Esmael et al., 2020, p. 339). This advantage is due to the proximity of the Iranian territory and naval forces to a narrow shipping corridor. Still, it doesn't mean that Iran has full control over it. Instead, it is more about the chance of creating risks for passing vessels and increasing the potential cost of intervention for external forces.

Geopolitical Intelligence Services Reports study helps to understand the military side of controlling straits. It argues that the deployment of naval bases near such spaces gives states the opportunity simultaneously ensuring free passage for a country's own vessels, and creating the potential to block adversaries (GIS, 2026). This shows that the control over the sea passage can have both defensive and offensive functions. Therefore, the Strait of Hormuz is not only a route for transporting energy resources, but also a space where issues of trade, security and distribution of power intersect. This connection can be further explained with the help of the concept of sea power. It is useful to address the difference between the existing potential and the actual political result of its use. In *The Concept of Sea Power* research paper, the sea power is defined both as the availability of naval resources and the ability to use them to influence the behavior of other states: "sea power must be defined as input, that is the sum of the various naval and maritime-related assets, as well as output, that is, the ability to influence the behavior of other actors" (Till, 2009, as cited in Albrecht et al., p. 3). In simple words, the state might have maritime forces like weapons, personnel, ports and other infrastructure. However, 'the result and importance' here is understood as whether they can influence the behavior of other states. Just like that, even if the Strait of Hormuz will not actually close, a credible threat of disruption can already force other states to take measures to protect supplies, reconsider foreign policy calculations, or begin negotiations. It is an instrument of political pressure.

At the same time, a favorable geographical location does not itself guarantee political or military superiority. Summarizing Mahan's principles, the authors of *The Concept of Sea Power* note: "the strategic value of a place is defined by the position/situation, the military strength (offensive/defensive), and the resources available at the place. He sees the central position as a supporting element that exists alongside many other supporting elements. Thus, the benefit of a central position is very limited when there is a stronger enemy on both sides" (Albrecht et al., pp. 7-8). In other words, the advantage for central position remains only in combination with the forces, resources and infrastructure that allow it to be used. So Iran's proximity to the shipping routes of the strait of Hormuz does not amount to absolute control over them. It is important to have naval forces, coastal missile systems, island infrastructure, and the ability to deploy mines, because those increase Iran's ability to pose risks to international shipping. Geography provides potential advantage, but it turns into a useful instrument when the state has financial capabilities to use it properly in their interests.

Historical Background

Key historical events show how the threat to shipping became part of the political and military confrontation. As Caitlin Talmadge points out: "even if the strait were not closed in the sense of being physically barricaded, military conflict in the area could cause prices to skyrocket in anticipation of a supply disruption—and to remain high until markets could be assured that the flow of commerce had been restored" (2008, p. 82). In other words, completely blocking the strait is not necessary for international consequences to occur. Even individual attacks, naval

mines, detention of ships, or threat of military clash can have an impact on transportation, cause price increases, and attract external naval forces to the region.

The first major event was the Tanker War, the naval phase of the Iran-Iraq War of 1980-1988 that began in 1984. Iraq attacked tankers related to the export of Iranian oil, because they wanted to cut Teheran's revenues. Iran, in turn, retaliated by attacking Iraq's ships and its supporting states like Kuwait and Saudi Arabia. As a result, merchant shipping became part of the war (Roos, 2026).

The threat to oil transportation led to direct intervention by the United States. The historical review of the events notes: "In 1988, an Iranian mine damaged the USS Samuel B. Roberts, a naval frigate on escort duty in the Persian Gulf" (Roos, 2026). In response, the US conducted Operation Praying Mantis, attacking Iranian ships and naval facilities. Later that year, the American cruiser USS Vincennes mistakenly shot down Iran Air Flight 655, killing all 290 people on board. These all gradually intensified the direct confrontation between Iran and the US.

Iran didn't completely block the Strait of Hormuz and the main fighting wasn't directly inside it. Talmadge highlights that Teheran has shown some restraint as Iran itself was dependent on the Strait of Hormuz. The complete closure of the route would have meant that they would be deprived of oil revenues and almost inevitably cause large-scale external interference. Complete closure was not necessary to create serious risks and force external states to change their behavior. Talmadge poses the main military-political problem: "the question is whether Iran can harass shipping enough to prompt U.S. intervention in defense of the sea-lanes" (Talmadge, 2008, p. 84). The main aim is to create a level of danger at which external states will be forced to intervene.

In the late 2000s and early 2010s, a similar situation happened. In 2008, Iran said it could block the strait if international sanctions were not lifted. Similar warnings were voiced after the European Union imposed an embargo on Iranian oil in 2012. The United States, Britain, and France have sent aircraft carriers and other warships through the strait, showing their willingness to protect freedom of navigation. However, Iran has not implemented its threat (Roos, 2026). As noted by historian Rudolf Matthee, similar confrontations have occurred before: "There have been standoffs like this since the Iranian Revolution when the regime came into power" (as cited in Roos, 2026).

In 2019, tensions shifted from threats to a series of real-life incidents. Though not all of them were directly in the strait. The May attacks, for instance, took place off the coast of the UAE, and the June attacks were in the Gulf of Oman. Still, they affected the safety of the entire route between the Persian Gulf and the open sea. On May 12th, four commercial vessels were damaged in explosions off the coast of the UAE. However, the culprit has not been officially identified: "The inquiry blamed an unidentified state actor. The US has accused Iran of responsibility, but Iran denies involvement" (Wintour, 2019). The uncertainty increased the risks and fears that the same situation might happen again.

On June 13th, tankers Front Altair and Kokuka Courageous were damaged in the Gulf of Oman, one ship caught fire, the other suffered hull damage, and the

crews were evacuated. The United States presented a video that, according to them, showed an Iranian military boat next to one of the damaged ships. Iran denied the accusations and stated that the incident could have been an attempt to provoke an armed clash (Wintour, 2019).

In July, the crisis continued directly in the strait. It happened when Iranian forces detained the British oil tanker *Stena Impero* since British Marines stopped an Iranian tanker near Gibraltar. Tehran's actions were widely viewed as a retaliatory measure, although Iran officially attributed the detention to a violation of shipping regulations. Rather than blocking the movement of all ships, Iran used their proximity of forces to the main shipping lanes to respond to Britain's actions (Roos, 2026).

The crisis of 2026 continued this pattern, but expanded this scale. The restriction of shipping, this time, became a direct part of the war and negotiations with the United States. The International Crisis Group highlights: "Tehran's influence over the strait is a tremendous source of leverage in its negotiations with the U.S. to end the war" (2026). The United States, in turn, imposed a blockade on Iranian ports to restrict oil exports and force Teheran to ease restrictions on shipping. Both sides used maritime communications as a means of economic and political pressure on each other.

2026 Crisis and the return of Hormuz

After the start of the US and Israel military operation against Iran on February 28, 2026, the strait once again became a centre of international conflict. And this time restrictions became widespread. On March 2, an Iranian Islamic Revolutionary Guard Corps official said, "The strait (of Hormuz) is closed. If anyone tries to pass, the heroes of the Revolutionary Guards and the regular navy will set those ships ablaze (as cited in Brown et al., 2026). And beginning on March 4th, 2026, Iranian forces have officially closed the strait and launched attacks on ships trying to pass through it. Iran began to form its own traffic control system: it required prior permission and discussed the introduction of transit fees. The conditions of access varied: states that maintained working relations with Teheran could negotiate passage, while ships associated with the United States and Israel were not allowed.

The memorandum to reach a common ground between sides on June 17, partially allowed the resumption of transportation, but did not resolve the dispute over who should determine the conditions of passage. If now an average of 28 ships pass the strait, before the war it was about 100. By mid-July, the attacks resumed, and only on July 14, the US restored the blockade of Iranian ports. There were more than 20 American warships and hundreds of aircraft in the region. The unclear wording of the memorandum allowed both sides to accuse each other of violating the agreement. "What was supposed to be a bridge from war to diplomacy has instead become another battlefield, with both sides using force to try to impose their own reading of the agreement's ambiguous terms," the International Crisis Group, a think tank that advocates to prevent war, said in a newsletter on the issue Tuesday (2026). The United States' military superiority did not mean that they could quickly

restore commercial traffic. This is because to stop trade, Teheran did not need to physically block every shipping lane. By giving a way to pass to some of the oil ships, Teheran kept part of the income and at the same time increased the costs for the opponents.

Regional and Global Implications

The consequences of the crisis in the Strait of Hormuz have affected several areas at once. They have affected energy security, international trade, the situation in the Persian Gulf, and the global economy as a whole. Therefore, this crisis cannot be considered only as a regional problem.

The crisis has created a double threat for the Gulf States. They depended on the American military presence and freedom of navigation, but at the same time they feared that increased US actions would lead to retaliatory Iranian strikes on their territory, ports and energy infrastructure. These concerns intensified after the attacks on American facilities in Kuwait and Bahrain. This has further increased instability in the region. Even a separate armed incident between Iran, the Gulf states, or external forces could lead to a more serious regional conflict.

The countries of the region have also begun to actively protect alternative routes. Saudi Arabia has proposed the creation of a multinational maritime coalition to protect shipping and energy routes in the Red Sea. At the same time, it redirected part of the oil through the East–West pipeline to the ports of the Red Sea. Rerouting oil through the East-West pipeline to Red Sea ports has limited the drop in oil deliveries, while higher oil prices have more than offset volume losses, generating an oil revenue windfall (International Monetary Fund [IMF], 2026).

Oman has proposed a model based on the experience of the Strait of Malacca. It allowed for voluntary payments for navigation services, but not mandatory transit fees. Speaking at a meeting of the International Maritime Organization council on Thursday in London, the Oman delegate Khamis bin Mohammed Al Shamakhi said: “The right of transit passage through straits used for international navigation is guaranteed under international law and does not support the imposition of transit fees on vessels passing through the strait of Hormuz” (Wintour & Christou, 2026).

European States have also considered this model. The UK opposed mandatory fees, but allowed payment for specific services related to traffic safety. Qatar has taken a tougher stance, fearing that recognizing Iran's special powers will make the countries of the region dependent on Tehran's political decisions. Qatar’s foreign ministry spokesperson, Majed al-Ansari, said: “Giving the Iranians sovereignty over the strait in a way that contradicts international maritime law will be basically agreeing to be hostages to whatever radical element that wants to take over the strait at any time”(Wintour & Christou, 2026). The different positions of Oman, Qatar and European states show that the dispute was not only about the safety of ships or the amount of possible fees. More important was the question of whether Iran itself

can set the conditions for passage through the strait, which is used by international shipping.

Regarding the economic consequences, during the first closure, as noted in the Beyond Hormuz report, at its peak more than 12 million barrels a day were taken off the market and traffic fell by over 90 per cent (George et al., 2026). Still, price increases have been limited by strategic reserves, bypass pipelines, China's reserves, and the ability of markets to redirect supplies. However, these mechanisms primarily protected the oil market. There were no comparable reserves for natural gas, fertilizers, and some types of industrial raw materials.

In addition, the crisis has intensified competition between the world's leading powers. The interests of the United States, China, Russia, the European Union, and the States of the region intersected in the Strait of Hormuz. The United States sought to preserve freedom of navigation and limit Iran's capabilities. It was important for China to maintain stable energy supplies, and European states tried to protect international rules of passage while avoiding further escalation. Therefore, the events around the strait have affected not only the Middle East, but also the relations between the larger international players.

Conclusion

The crisis in the Strait of Hormuz goes far beyond the regional conflict and represents one of the most serious challenges to modern international security. Its consequences affect not only the States of the Middle East, but also the global economy, global energy markets, international trade and the system of international relations in general.

The crisis of 2026 just proved that the Hormuz's importance is formed through the blend of its geographical location, size, and Iran's possibility to deter other sides without even closing the full strait. One can also see the limits of military force just by looking at the US's example that tried to return the previous level of passage. Thus, the measures should be taken with not just a mere focus on military protection of the route, but on reduction of the possibility of a new escalation. There should be constant communication channels between Iran, Oman, and the Gulf countries. Moreover, they should agree on clear rules of passage and joint mechanisms for reporting mines and attacks in a way that it will not result in misunderstanding as it was between the US and Iran; they should not interpret them in the opposite way this time. In the long term, exporters and importers should expand alternative pipelines. The crisis may also accelerate the transition to other energy sources. However, it is not yet possible to completely replace the Strait of Hormuz, since existing alternative routes are not capable of transporting the same amount of resources. Therefore, it is important to mitigate at least some of the economic consequences internationally.

In our opinion, the issue of blocking or opening the Strait of Hormuz for navigation lies primarily in the political and legal sphere. Its further settlement will depend on whether the parties, who see security issues in the region differently, can

reach a compromise and take into account not only the immediate, but also the possible long-term consequences of their decisions. These differences also relate to a more general approach to regional security. Iran, for example, advocates a greater role for the states of the Middle East themselves and less dependence on the other regions. Therefore, a compromise should relate to the conditions of navigation, safety guarantees and the distribution of responsibility in the Strait. Such a decision may have implications for other strategically important sea straits, as changing existing rules may cause new disputes in other regions of the world. In addition, the situation around Hormuz is difficult to completely separate from other problems in Iranian-American relations. An agreement on the strait will not solve them by itself, but it can reduce tensions and facilitate further negotiations, including on Iran's nuclear program.

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