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IRAN AND THE STRAIT OF HORMUZ AS A TOOL OF INFLUENCE IN ASYMMETRIC WARFARE: DETERRENCE OPPORTUNITIES AND THE SUSTAINABILITY DILEMMA

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Abstract

This paper explores the emergence of the Strait of Hormuz as a key tool of influence in the conflict between the United States and Iran. The United States' attack on Iran and its efforts to topple the ruling establishment effectively opened the door for maritime traffic to be disrupted in the strait. Given the severe global repercussions — particularly for energy security and the supply of strategic commodities — this Iranian strategy is an important factor that has shaped the trajectory of the conflict.

The paper argues that the strategy has provided Iran with both a deterrent capability and a bargaining tool that has helped limit its losses and compromises at the negotiating table. At the same time, the paper argues that treating the Strait of Hormuz as a long-term and reliable strategic asset carries substantial risks and limitations. Legal and regulatory restrictions, together with the broader international balance of power, present significant obstacles to adopting such a standpoint.

To assess the aforesaid dynamics, the paper examines the strategic importance of the strait in Iran's regional policy, its use in the context of the current conflict with the United States and Israel, the advantages Iran has accrued from this strategy and the challenges ahead.

Keywords: US-Iran war, Strait of Hormuz, Iranian strategy, asymmetric warfare, deterrence, Middle East, Arabian Gulf.

Introduction

The US-Israel war against Iran has foregrounded the strategic significance of the Strait of Hormuz as a decisive factor in shaping the conflict, providing Iran with an important bargaining tool that has influenced both the trajectory and objectives of the war. For decades, the strait has served as a central element in Iran's asymmetric confrontation with the United States. Tehran previously relied on this leverage during the Iran-Iraq War in the 1980s and again following the "maximum pressure" campaign launched after the US withdrawal from the nuclear agreement in May 2018. In the aforesaid cases, however, the use of the strait remained within the bounds of limited escalation and a policy of denial designed to avoid direct consequences because of attacks on ships and oil tankers. In the context of the current conflict, by contrast, Iran has threatened maritime traffic through the strait on an unprecedented scale as part of a shift in military doctrine from a defensive to a more offensive posture. This shift seeks to establish a balance of deterrence and potentially alter the long-term status of the strait by capitalizing on the leverage during the negotiations derived from its closure and control.

Against this backdrop, the paper asks whether Iran can transform the Strait of Hormuz into a sustainable strategic asset. This central question gives rise to several subsidiary inquiries: the strait's importance, its role in Iranian foreign policy, the ways in which Iran has employed it as a tool of leverage in the current conflict to influence freedom of navigation, the consequences and benefits of this approach for Tehran, the challenges it has generated, and the extent to which Iran can sustain control over the waterway and impose a new reality by altering its legal status.

The paper argues that the Strait of Hormuz holds an exceptional position in the global economic system because of its critical role in energy security, and restrictions on maritime traffic through it contribute to extraordinary economic pressures. It further contends that a direct correlation exists between the level of threat confronting Iran and the degree to which it relies on the strait as a source of leverage. In other words, the more existential the threat to the Iranian political system, the greater its willingness to modify its military doctrine and move toward restricting navigation in the strait to establish deterrence.

At the same time, the paper maintains that Iran's prospects for transforming the strait from an effective wartime tool into a permanent peacetime source of power remain limited. Efforts to alter its legal status, control maritime traffic or impose transit fees face substantial obstacles. By adopting a realist perspective, the paper examines Iran's use of the Strait of Hormuz as a tool of power and deterrence within an asymmetric conflict aimed at compensating for broader power disparities. It assumes that Tehran views the strait as a geopolitical pressure point through which it can maximize its influence and safeguard the survival of its political system. Nevertheless, the prevailing international balance of power,

military asymmetries and legal constraints make a lasting alteration to the status quo unlikely.

Methodologically, the paper employs an inductive approach based on the systematic collection of data and the identification of interconnected relationships to derive broader explanatory patterns. It also draws on complementary methods, including legal analysis and case-study research, in accordance with the complexity and multidimensional nature of the issues under examination.

Significance of the Strait of Hormuz in Iranian Foreign Policy

The Strait of Hormuz is of strategic significance because it is one of the world's most important natural waterways. Drawing on the advantages of geography, Iran has sought to employ the strait as an influential geopolitical asset that supports its regional ambitions and strengthens its international position.

Strategic Significance

Geographically, the Strait of Hormuz links the Arabian Gulf to the Gulf of Oman, separating Iran to the north from Oman to the south. The strait extends for 90 nautical miles and narrows to just 21 nautical miles at its narrowest point. ⁽¹⁾In legal terms, the Strait of Hormuz is regarded as an international strait connecting two areas of the high seas, meaning two regions that are not under the sovereignty of any state. It therefore enjoys a special status under international law, which guarantees freedom of navigation, ⁽²⁾ in accordance with the principle of transit passage that ensures free, continuous and unhindered movement for all civilian and military ships and aircraft. ⁽³⁾

Under this principle, vessels and aircraft exercising transit passage are required to proceed without delay through or over the strait, to refrain from any threat or use of force against the sovereignty, territorial integrity or political independence of the bordering states, and to comply with generally accepted rules, procedures and practices relating to maritime safety, including those concerning the prevention of collisions and the prevention of pollution from ships. ⁽⁴⁾

However, given the strait's importance within power politics, global balances and strategic competition, the principle of transit passage remains subject to ongoing practical debate, particularly in times of crisis and conflict. It is often reinterpreted by both littoral states, such as those bordering the Strait of Hormuz, and major powers. This is especially significant given that the agreement establishing this principle is not recognized by all states, including Iran and the United States.

Given that Iran and Oman are the two states bordering the Strait of Hormuz, with the legal responsibilities and obligations that this entails, the two countries signed a declaration in March 1974 affirming mutual commitment to ensuring the safety of international navigation and freedom of transit through the Strait of Hormuz. ⁽⁵⁾This agreement is considered the legal framework governing the conduct of both states in relation to the strait, regardless of the practical reality

that has effectively positioned Iran as the protector of the security of this vital waterway, by virtue of its power and influence.

It is also noted that the official traffic separation lines in the strait, as determined by the International Maritime Organization (IMO) with the consent of the maritime states, lie south of the median line of the Strait of Hormuz, within the territorial waters of Oman. This arrangement is attributed to the fact that the deeper waters within the strait are located on the Omani side, whereas outside the strait, along the Greater and Lesser Tunb Islands and the Farur Islands, the water depth and traffic separation lines tend toward the Iranian coast.⁽⁶⁾

Strategically, the importance of straits and maritime passages varies, as some play vital roles in three main areas: global trade, maritime security and international connectivity. The Strait of Hormuz is not only among these strategically important waterways, but is also considered the most significant in strategic and geopolitical terms.

The main challenge is that many straits and maritime passages can be bypassed through alternative routes; for instance, the Strait of Magellan can serve as an alternative to the Panama Canal, and the Cape of Good Hope route can substitute for the Bab al-Mandab Strait. In contrast, there is no natural or purely economic alternative to the Strait of Hormuz for the transport of Gulf oil, which makes it a decisive factor in both regional and international balances of power.

This reality has made the Strait of Hormuz one of the most important strategic assets for global trade and the global economy. Consequently, any disruption to the regulation of traffic through this strait could lead to a major global crisis, as the strait is a vital chokepoint through which global energy, trade and power flow. Any change in its status affects not only the surrounding region but the entire global system.

A fifth of the world's oil and liquefied natural gas passes through the Strait of Hormuz, in addition to exports and imports estimated to be worth hundreds of billions of dollars. Since its security ensures the passage of ships and maintains the flow of oil in global markets, any disruption to it affects global crude oil prices and harms the global economy as a whole.⁽⁷⁾

In the same vein, the Strait of Hormuz is of paramount importance from a security and military standpoint, as it is not merely a tool of power but also a source of it. Control over the strait, or parts of it, enables the monitoring of naval and merchant fleet movements. Straits also contribute to strengthening influence and shifting the balance of power in relation to rivals.

For example, the United States has maintained a significant military presence near the strait since World War II, in recognition of its security and military importance.⁽⁸⁾ This is despite the United States' reduced interest in the region over the past two decades, as well as the fact that it no longer relies on Gulf oil for its energy needs, having become the world's largest producer. This military presence remains the largest compared to any other US deployment in a similar geographical area. The US military presence around Hormuz reflects the continuity of US

hegemony, both during the Cold War and in the unipolar era. The strait has acquired particular importance in the ongoing confrontation with Iran since 1979.⁽⁹⁾

The importance of the Strait of Hormuz has grown amid the critical phase currently facing the international system, marked by intensifying competition between the United States and China, the contest over international trade corridors between the two powers, rivalry for influence in the Middle East and efforts to control global supply chains. This competition is reflected in initiatives such as the Belt and Road Initiative and the India-Middle East-Europe Corridor, both of which converge in the Arabian Gulf, particularly within the strategic Hormuz corridor. The war has demonstrated the significance of the strait as a strategic asset in the broader competition for global influence between the major powers.⁽¹⁰⁾

At the regional level, the Strait of Hormuz is vital for some Gulf states and critically important for others, as it constitutes their only access to the open seas and oceans. Most major oil refineries in the Gulf states are located along the coasts of the strait and the Arabian Gulf, and the bulk of their oil exports pass through this waterway. As a result, the strait is essential to their economic development and stability. The strait is also important to the standing and influence of the states bordering it, as strategic waterways can enhance national power and serve state interests. A number of countries have benefited from this geographical advantage, including Iran, which has employed the strait as a bargaining tool and a source of pressure when necessary, particularly during periods of complex pressure and crisis. Consequently, the Strait of Hormuz has remained a persistent source of contention (see Map 1).

Map 1: The Strait of Hormuz



Source: Mindy L. Richlen et al., "The Catastrophic 2008–2009 Red Tide in the Arabian Gulf Region, With Observations on the Identification and Phylogeny of the Fish-Killing Dinoflagellate *Cochlodinium Polykrikoides*," *Harmful Algae* 9, no. 2 (2010): 165, <https://doi.org/10.1016/j.hal.2009.08.013>.

Hormuz's Position in Iran's Regional Strategy

There is no doubt that the Strait of Hormuz held particular importance even before the 1979 revolution. The shah's government recognized the significance of the strait within the context of its regional ambitions. Following the 1979 revolution, however, the new Iranian leadership devoted increasing attention to the Strait of Hormuz, reflecting the growing focus of Iranian policy on the Gulf region and West Asia. This interest was linked to the ruling establishment's aspiration to export the 1979 revolution to neighboring countries and was consistent with its ideological orientation, which included opposition to what it viewed as an unjust international order that served the interests and hegemonic ambitions of the major powers.

Accordingly, Iran declined to recognize a number of international laws and rules. This position was reflected in its decision not to accede to UNCLOS, limiting its involvement to signing the agreement. This stance stemmed from the rejection of Iran's proposal to apply the principle of innocent passage,⁽¹¹⁾ as set out in the 1958 Geneva Convention, to the Strait of Hormuz as the most appropriate and applicable regime, on the grounds of protecting its security and sovereignty. It is also noteworthy that the signing of the convention coincided with the Iran-Iraq War (1980–1987). In 1982, in particular, the United States became involved in the conflict, and the so-called Tanker War emerged, intensifying the use of the strait and the issue of freedom of navigation as bargaining tools in the military confrontation between the parties to the war.⁽¹²⁾

Since then, Iranian leaders have repeatedly threatened to close the Strait of Hormuz, although these threats have never been implemented in practice on a large scale. During the Iran-Iraq War, Hashemi Rafsanjani, who was then speaker of Parliament and the supreme leader's representative on the Supreme Defense Council, threatened in 1983 to close the strait, but no such action followed. The period witnessed what became known as the Tanker War, yet the confrontation did not escalate to the point of shutting down the waterway, as US naval forces escorted oil tankers and countered Iranian threats.

It can nevertheless be argued that the Strait of Hormuz has become a central component of Iran's strategy and defense doctrine, particularly following the intensification of US pressure and sanctions after the disclosure of Iran's nuclear program in 2002. Within the framework of its asymmetric confrontation with the United States and Israel, Iran has sought to accumulate additional sources of leverage. In response to international sanctions imposed on Iran in 2011, President Mahmoud Ahmadinejad threatened to close the strait.⁽¹³⁾

In practice, Iran did not disrupt navigation through the Strait of Hormuz during this period. Instead, it adopted an asymmetric approach to restricting maritime traffic, including the detention and inspection of vessels as part of a strategy of bargaining and reciprocal pressure. At the same time, it continued to prepare its forces and capabilities to control the strait if circumstances required. Over time, the Strait of Hormuz assumed a central place in the doctrine of the

Iranian naval forces. In this context, Iran developed a range of more flexible and less costly capabilities, including drones, short-range missiles, unmanned boats and other means designed to influence navigation in the Gulf and through the Strait of Hormuz, alongside more traditional tools such as naval mines.⁽¹⁴⁾

The Strait of Hormuz arguably assumed greater prominence in Iranian policy following the United States' withdrawal from the nuclear agreement in May 2018. Iran warned that it could close the strait to oil exports if the United States sought to prevent Iranian oil from being exported through the waterway. Given that Iran's oil and gas reserves, as well as its principal ports, are located along the Arabian Gulf, the strait is of vital importance to the country's economy and political stability. As a result, the escalation of US pressure — particularly over the nuclear issue and the accompanying intensification of sanctions — placed the Strait of Hormuz at the center of the confrontation between Tehran and Washington. In 2018, after US President Donald Trump threatened to reduce Iranian oil exports to zero, Iranian President Hassan Rouhani stated, "The Americans claim they want to completely stop Iranian oil exports... It is meaningless to say that if you stop Iranian oil exports, no oil will be exported from the region. If you can, try it and see the results."⁽¹⁵⁾

On the ground, throughout decades of crises and confrontations, Iran's threats have never progressed to the point of closing the Strait of Hormuz, largely out of concern over the prospect of entering into an unpredictable confrontation with the United States and the broader international community. Nevertheless, a number of actions attributed to Iran have demonstrated its ability to use the strait as a tool of pressure and influence. These actions included the harassment of vessels transiting the waterway, the targeting of certain ships and tankers in the Gulf, the seizure of some vessels and the escalation of the so-called Tanker War between Iran and Israel. At the same time, this approach created a dilemma for Iran. The significance of the Strait of Hormuz extends beyond its role as a bargaining tool in the confrontation between Tehran and Washington. The strait is also a vital artery for the global energy market and for the Gulf states, whose oil exports constitute the principal source of national income and the main driver of investment and development projects.

As a result, from the 1980s until the outbreak of the most recent war, Iran faced a strong regional and international response. A number of alliances were established to protect navigation through the Strait of Hormuz and ensure the continued flow of oil exports, including the International Maritime Security Construct (IMSC). Key participants in the IMSC included the UK, Saudi Arabia, the UAE, Australia and Bahrain. France also led a number of European countries — including Belgium, Denmark, Germany, Greece, Italy, the Netherlands and Portugal — in efforts to contribute warships to help secure the strait. In addition, countries such as Japan, South Korea, Russia and China independently participated in efforts to safeguard freedom of navigation through the Strait of Hormuz by deploying naval vessels in the Gulf. Russia and China, however, approached

the issue of protecting navigation in the Gulf from a perspective that differed from that of the United States and other Western powers. This difference reflected broader international competition and the struggle for influence in the region.⁽¹⁶⁾

Iran and Oman did not particularly welcome US and Western initiatives, viewing them as a challenge to their influence over the Strait of Hormuz. In addition, the operational theater of these alliances lay within their territorial waters, which could generate tensions and the risk of unintended escalation at any time. The two countries also considered that such measures restricted their right to supervise the strait in accordance with UNCLOS, and undermined the rules and regulations they had endorsed under this framework to protect their sovereignty and adjacent territorial waters. For this reason, Iran proposed the Hormuz Security Initiative as an alternative regional framework to ensure the security of navigation through the strait during the 74th session of the UN General Assembly in 2019. However, the initiative did not gain traction, in light of Iran's adversarial regional posture and the strained nature of its relations with the Gulf states.⁽¹⁷⁾

In the same context, it is worth noting the US efforts to form a regional security alliance in the Gulf, specifically aimed at protecting navigation in the Strait of Hormuz, and, in contrast, joint Russian-Chinese-Iranian naval maneuvers were held periodically in the northern Indian Ocean region from the beginning of 2016 until the beginning of 2026. These developments reflect the reality of international competition and the increasing militarization around the strait, and demonstrate that the strait, as a strategic chokepoint, is gaining increasing importance in the calculation of major powers, particularly within the anti-hegemonic axis led by Russia and China, within which Iran seeks to position itself.⁽¹⁸⁾

Regional security is adhesively reliant on the strait. During periods of de-escalation, Iranian threats concerning the Strait of Hormuz declined, as witnessed following the Gulf-Iran rapprochement achieved through the 2023 Beijing Agreement between Saudi Arabia and Iran, and earlier in 2021 following the Biden administration's retreat from Trump's "maximum pressure" campaign. Consequently, incidents involving the targeting of ships and tankers in the Arabian Gulf and the Sea of Oman decreased.

However, with Trump's return to the White House in 2025 and the launch of direct military operations against Iran in June 2025, followed by another phase in February 2026, the Strait of Hormuz again moved to the forefront as a tool of influence and deterrence. Iran accordingly sought to transform it into a durable tool of power to reinforce regime survival, as part of broader changes in its military doctrine toward an offensive rather than defensive posture.⁽¹⁹⁾

Thus, it can be said that the "Strait of Hormuz card" did not emerge suddenly in Iran's regional policy, but rather developed gradually within the context of Iran's conflicts in the Gulf and to counter the US presence in the region. Tehran views the US presence near the Strait of Hormuz as an effort to assert hegemony, deter Iran and deny it any influence over this strategic passage. At the same time, Iran has remained cautious not to disrupt navigation through the strait within

the framework of a calculated confrontation strategy. However, this option is inevitable considering the asymmetrical and existential nature of the conflict that Iran is engaged in.

Hormuz in Iran's Post-War Strategy

With the outbreak of US-Israel attacks on Iran, Tehran placed significant emphasis on the Strait of Hormuz as a strategic card for deterrence and sought to leverage the new reality to pursue a more sustainable shift in the strait's status.

War Rhetoric and Employing Hormuz as a Tool of Deterrence

During the first week of the war, Iran conveyed a clear message indicating its intention to block maritime traffic through the Strait of Hormuz. This message was repeated by political and military officials, including Brigadier General Ebrahim Jabari, advisor to the commander-in-chief of the Islamic Revolutionary Guard Corps (IRGC), who declared readiness to confront any oil shipment passing through the strait and issued warnings to neighboring countries. He stated, "We will burn any ship that tries to cross the Strait of Hormuz. We will attack oil pipelines and will not allow a single drop of oil to leave the region."⁽²⁰⁾

The first message from the new Supreme Leader Mojtaba Khamenei reaffirmed the central role of Hormuz in Iran's defense strategy. He called for the use of all available resources to close the strait, making it the focal point of military action.⁽²¹⁾ This also reflected the new supreme leader's strong intention to escalate the conflict from a regional confrontation into one with direct implications for the global economy, thereby increasing the costs of war for all parties involved.

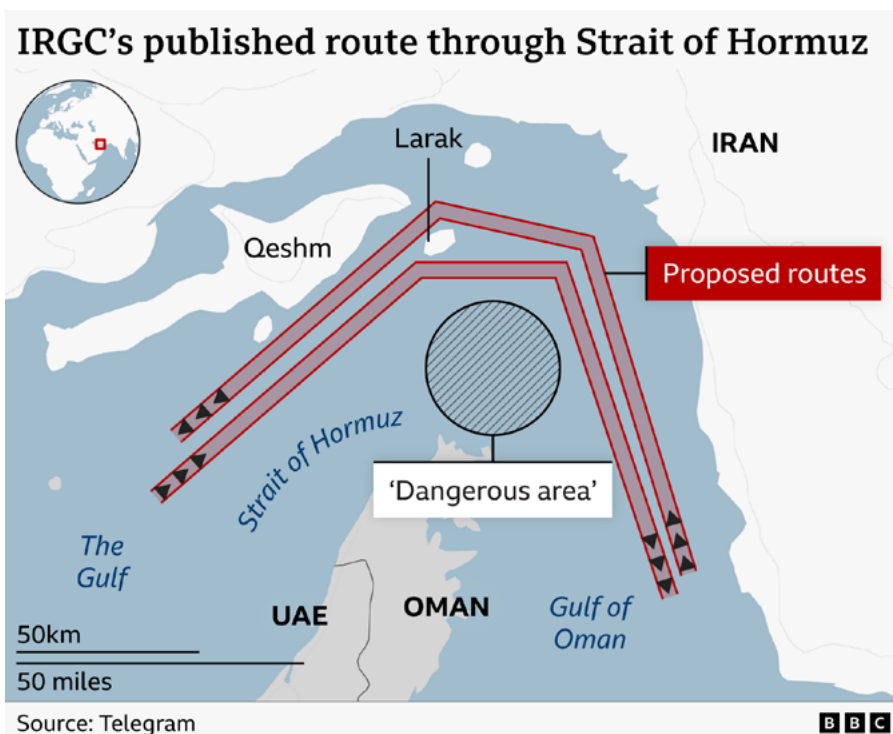
With the United States and Israel launching a military offensive aimed at regime change, Iran moved away from its established pattern of asymmetric warfare and calibrated escalation, resorting to all available means to ensure its survival. Among its most important assets in this context is the Strait of Hormuz. Although Iran did not formally close the strait, it required ships to coordinate and comply with its monitoring mechanisms for passage during both the conflict and ceasefire periods. It also fully prohibited the passage of vessels affiliated with the United States and Israel. Iran holds a strategic advantage under this policy, as the approximately 1,600-kilometer northern coastline of the strait along Iranian territory provides multiple opportunities for projecting military power. These include the deployment of troops, the laying of naval mines, the use of coastal missile systems and the operation of fast-attack craft, all of which grant Iran an operational edge in the area. Accordingly, the Strait of Hormuz is not merely a transit route but also a potential tool for power projection and deterrence. Iran does not require complex combat operations to disrupt traffic through the strait; even the threat of disruption significantly affects maritime movement. Iran did not explicitly announce the closure of the strait but instead relied on what it considers internationally recognized rights and naval warfare rules, including its interpretation of the violation of the right of innocent passage, to regulate and

scrutinize transit with the aim of constraining navigation. In this context, the IRGC published a map identifying dangerous and safe zones, encouraging ships to pass closer to the Iranian mainland near Larak Island — a route reportedly used by some vessels during the war, enhancing Iran’s ability to control movement through the strait (see Map 2).⁽²²⁾

To achieve its objective, Iran employed asymmetric warfare tactics, including drones, unmanned vessels and naval mines. Iran is known to possess a range of weapons capable of threatening maritime traffic in the Strait of Hormuz, most notably attack drones such as the long-range Arash-2 and the Shahed-101, which can carry out precision strikes against ships.

These systems, along with anti-ship ballistic missiles, fast-attack-craft and unmanned boats, provide Tehran with strategic leverage over one of the world’s most important waterways. Experts assess that the extensive use of these capabilities could disrupt global trade through the strait, which carries approximately one-third of the world’s oil supply.⁽²³⁾

Map 2: The IRGC’s Authorized Route Through the Strait of Hormuz



Altering the Legal Basis and Imposing a New Post-War Reality

It is understood that dealing with the Strait of Hormuz during wartime differs from its management in peacetime. National security threats may override

established rules and norms, and international law provides states with the right to restrict and monitor passage under conditions of threat. However, it appears that Iran, which is not a signatory to UNCLOS, seeks to use the war as an opportunity to fundamentally and sustainably alter the legal framework governing the strait.

Iran maintains that the Strait of Hormuz is shared between Iran and Oman, and is not an international waterway in the sense of open international waters, while affirming that all states have the right of innocent passage in peacetime. At the same time, Iran interprets this right in a more restrictive manner due to its non-ratification of UNCLOS, and consequently considers itself legally free to act in this regard. In this context, Iran seeks to exploit the war to impose a new legal and strategic reality in the strait that would enhance its influence.

Accordingly, during the war, some voices affiliated with the establishment put forward six main conditions for ending the conflict, including the imposition of a new legal regime for the Strait of Hormuz.⁽²⁴⁾

Moreover, Tehran appears to be seeking to transform this control into a lasting gain. This is reflected in a memorandum Iran submitted to the Security Council and the IMO, in which it stated that non-hostile vessels could transit the Strait of Hormuz provided they coordinate with the Iranian authorities.⁽²⁵⁾ Iran also included, as part of its proposals for a ceasefire and the initiation of negotiations with the United States, its claimed right to manage the strait and the IRGC's oversight of transit through the waterway.⁽²⁶⁾

In addition, Iranian officials have advanced proposals to impose transit fees on passage through the Strait of Hormuz of up to 10%. In this context, the head of the Joint Iran-Iraq Chamber of Commerce estimated that such fees could generate annual revenues for Iran of between \$70 billion and \$80 billion. The Iranian government has sought to translate this ambition into practice by moving toward the institutionalization of financial charges in exchange for safe passage through the strait and by leveraging its coercive control over Hormuz to impose a new economic reality on both regional states and the broader international community.⁽²⁷⁾

In this context, the Iranian Parliament considered a draft measure titled "the Strategic Action Law for Peace and Sustainable Development in the Gulf Region." The proposal contains several key provisions relating to the Strait of Hormuz, including security arrangements in the strait, maritime navigation security, financial arrangements and toll systems denominated in rials, restrictions on passage by the United States and Israel, the exercise of Iran's sovereign role and that of its armed forces, cooperation with Oman within the legal framework governing the strait, and the prevention of transit by countries participating in unilateral sanctions against Iran. Although the National Security Committee of the Iranian Parliament approved the draft measure, it has not yet been submitted to the full Parliament for a vote. According to the proposal's proponents, it could be reintroduced for parliamentary consideration in the event of a renewed war or any future confrontation.⁽²⁸⁾

According to reports, Iran has already tested a system for transit through the Strait of Hormuz under which ship operators are required to contact the IRGC through an affiliated intermediary company. As part of this process, operators provide information on vessel ownership, the state's flag, cargo, destination, crew list and automatic identification system (AIS) data. The IRGC then conducts a security review to assess whether the vessel has any connection to the United States, Israel or any party considered a threat to Iran. If the vessel passes this review, negotiations begin over the applicable transit fees. According to reports, the level of fees varies depending on the nature of Iran's relationship with the country involved, with friendly states receiving more favorable terms. The fees are reportedly paid in Chinese yuan or stable cryptocurrencies, and the cost of transit for large oil tankers can reach \$2 million per vessel. Following approval, the ship receives a transit permit and a designated route. As it approaches the Strait of Hormuz, the route is reviewed through wireless communications, after which the vessel is escorted by an IRGC patrol along the specified passage.⁽²⁹⁾

In an effort to avoid the appearance of exercising exclusive control over the Strait of Hormuz and disregarding Oman's rights with respect to the waterway, Iran announced on April 5, 2026, that it was working with Oman to draft a protocol governing maritime transit through the strait. This move suggests that Iran sought to complete the legal framework underpinning its actions and to involve Oman in an arrangement that would support its efforts to exercise greater control over the Strait of Hormuz.⁽³⁰⁾

The Outcomes of Employing Hormuz in the Conflict

Iran has tested its Hormuz strategy and continues to do so. While it has succeeded in leveraging the strait within the context of the conflict, creating important opportunities for itself, its approach also faces significant challenges.

Iranian Gains

Although Iran's policies conflict with established international rules and norms governing the management of straits, the current international order is undergoing significant upheaval and transformation. This is driven by the power-based policies increasingly pursued by major powers, which have challenged the effectiveness of the rules-based order previously championed by the United States. As a result, the effectiveness of international institutions and legal frameworks has also been diminished.

Iran is seeking to take advantage of this environment to impose a new reality in the Strait of Hormuz or to advance its own legal interpretation of the right to manage and control the waterway. It is encouraged in this effort by the convergence of major-power interests around this vital passage, which occupies an important place in the global balance of power. This was reflected in the UN Security Council's inability to reach a decision on defending freedom of navigation in the strait, as well as in Russia and China's use of the veto against the resolution

condemning Iran or any resolution granting Iran the authorization to use force to guarantee freedom of navigation through the waterway.⁽³¹⁾

It can perhaps be argued that the Strait of Hormuz has become a tool through which competing powers seek to reshape not only regional balances, but also the broader structures of the global economy and international politics. A relatively sustained closure of the strait could contribute to the reconfiguration of economic, political and strategic equations, transforming it from a vital transit corridor into a significant factor in shaping the structure of the international system.

From Iran's perspective, this is consistent with its ideological vision and its aspiration for what it considers a more just international order, as well as with its longstanding objective of opposing hegemony and arrogance in accordance with its established ideological principles.

Internationally, it appears that Iran came under pressure to retreat from its position on closing the strait and obstructing navigation, and faced the possibility of the formation of an international coalition to protect maritime traffic through the waterway. In this context, the UK organized meetings and consultations to address the issue of ensuring the reopening of the Strait of Hormuz. According to the UK foreign secretary, foreign ministers and representatives from more than 40 countries met to discuss the urgent need to restore freedom of navigation for international shipping, and to demonstrate the strength of their determination to reopen the strait.⁽³²⁾

In practice, however, European efforts remained fragmented and did not develop into a practical plan for intervening to protect freedom of navigation. This, in turn, encouraged Iran to continue its policy of closing the strait and using it as a bargaining tool. It was further reinforced by the fact that calls by Trump for several countries to deploy ships to secure navigation through the Strait of Hormuz did not receive a response, and no regional alliances emerged, unlike during his first term, when Iran had escalated attacks on shipping. This lack of response was partly due to the unwillingness of some actors, particularly European states, to participate in any military operation in which they had not been involved from the outset, as well as existing strains in the transatlantic relationship in light of Trump's criticism of European countries and NATO. Accordingly, the European position sent an implicit message to Trump regarding the difficulties his military approach could face in the absence of NATO coordination, and another message to Iran regarding the absence of transatlantic consensus — an environment that ultimately encouraged Tehran to proceed with its policy concerning the Strait of Hormuz.⁽³³⁾

In addition, control of the Strait of Hormuz provides Iran with an influential tool in the course of the conflict, as any disruption of navigation through the strait — and any potential structural changes in its management — ultimately affect global energy security and trade. This is illustrated by the adverse impact of the closure of the strait on global energy markets: approximately 20% of global

oil flows, or around 20 million barrels per day, as well as 20% of global liquefied natural gas trade, were disrupted.

This had severe implications for the stability of the global economy, including a rise in oil prices to above \$120 per barrel, nearly double their lowest levels in recent years. It was further expected that oil prices could reach \$200 if the war continued. The closure of the strait also threatened the flow of approximately 20%–30% of materials required for fertilizers used in global food production. Overall, this situation had a significant impact on countries worldwide and on regional supply chains, while also increasing the cost of living in many states.⁽³⁴⁾

While the closure of the Strait of Hormuz led to a multidimensional global crisis, with the security of the strait becoming a top priority for the world and the United States, Iran simultaneously secured a number of gains. Iranian oil exports rose by 37% after the Trump administration released previously detained Iranian oil and permitted the sale of additional quantities, under pressure from supply shortages and efforts to contain rapidly rising prices. Iran also benefited from higher oil prices, generating increased revenues. In addition, it engaged in bargaining with companies and states over facilitating the passage of its tankers, receiving fees in return.⁽³⁵⁾ On another level, the Iranian government received a series of calls from international and regional leaders, contributing to a partial break in its isolation, including interactions with France and other regional actors. This is reflected in statements by French President Emmanuel Macron, who noted that he had stressed in a call with the Iranian president the need to guarantee freedom of navigation by ending the closure of the Strait of Hormuz.⁽³⁶⁾

Furthermore, Iran has used the Strait of Hormuz as a tool of pressure within its deterrence strategy, imposing significant costs on adversaries and the international community in an effort to recalibrate the balance of power at both the regional and global levels. To a considerable extent, it has transformed the strait from a purely economic waterway into a central factor in power politics.

Despite the United States imposing a military embargo on Iran, Tehran still retains a geographical advantage that enables it to continue exerting influence over the strait. This influence may persist even in peacetime, as shipping and insurance companies remain reluctant to assume risks in the absence of strong guarantees.⁽³⁷⁾

Thus, the Strait of Hormuz has emerged as Tehran's strongest bargaining chip against the United States, which, for its part, failed to fulfill its pledge to secure the strait unilaterally. The US president spoke of ensuring freedom of navigation by having US warships escort tankers, and Washington even considered reopening the strait by force, but this did not materialize. Trump's threats of retaliation, including strikes against energy facilities if the Strait of Hormuz was not opened to navigation, also proved ineffective. The Iranians persisted in using this lever, given its demonstrated effectiveness as an asymmetric deterrent in what they consider a decisive war with the United States and Israel. They succeeded in placing the issue of the strait and its management among the terms of the ceasefire

agreement, and possibly even as a central condition. As Iranian Foreign Minister Abbas Araghchi stated after the agreement, “Safe passage through the Strait of Hormuz will be possible in coordination with the Iranian armed forces, taking into account technical restrictions.”⁽³⁸⁾ Subsequent developments following the announcement of the agreement, including Iran linking compliance in the Hormuz issue to ending the war in Lebanon, lifting US sanctions, stopping the siege before entering into negotiations on the nuclear issue, suggest that the Strait of Hormuz remains the key bargaining tool which Iran continues to rely on in this conflict.

Thus, Iran’s use of the Strait of Hormuz as leverage has significantly impacted the course of the conflict, disrupting US calculations and prompting global and regional powers to pressure Washington to end the war. Even the United States was affected by the consequences of the suspension of navigation through the strait. Ultimately, the strait has become Iran’s primary bargaining chip in negotiating an end to the war, as reflected in the ceasefire agreement brokered by Pakistan and other regional actors between the United States and Iran.

Accordingly, the Strait of Hormuz has been transformed into a strategic asset for Iran in its conflict with the United States, despite the imbalance in military power. It can be argued that the “Hormuz card” helped protect the establishment from potential collapse under the pressure of US-Israeli military strikes. This raises the question of whether Iran’s ambitions regarding the strait were limited to wartime, or whether they extend further toward transforming it into a sustainable strategic asset.

It can also be suggested that without the “Hormuz card,” Iran would have been in a far more precarious strategic position and the establishment would have faced existential challenges. Moreover, the victory narrative promoted by the supreme leader and his officials may have been inadvertently reinforced by the United States and Israel given Iran’s assertion of control over the strait and the shock it inflicted on the global economy — framing steadfastness and survival as a form of victory, despite significant losses and the difficult future the establishment is likely to face.⁽³⁹⁾

Legal Obstacles and Systemic Challenges

Although Iran has rediscovered the Strait of Hormuz as a powerful deterrent in an asymmetric war that has threatened the survival of the establishment, a number of challenges continue to hinder its efforts. The first of these challenges is legal in nature. According to UNCLOS, Iran’s obstruction of passage through the Strait of Hormuz constitutes a clear violation of the principle of freedom of navigation.

Under the provisions of this convention, international straits such as the Strait of Hormuz are governed by the regime of transit passage, which guarantees freedom of navigation. This regime grants coastal states only limited monitoring powers and obliges them not to impede the passage of ships and aircraft through international straits. This stands in contrast to the narrower concept of innocent passage invoked by Iran, as outlined in the 1958 Geneva Convention.

Given the balance of power, it appears difficult for Iran to challenge international rules or establish a new legal status governing passage through the Strait of Hormuz, particularly in peacetime. Such a shift would create a complex legal environment and establish a precedent that could be replicated elsewhere, potentially turning international straits into zones of recurring conflict. This, in turn, would further complicate the security landscape and disrupt international trade.

It is unlikely that regional and international powers would accept such an outcome. The issue could once again be brought before the UN Security Council, and relevant international actors and organizations, including the World Trade Organization, and specialized energy institutions, may intervene. It also appears improbable that any state or party, including China and Russia — despite their alignment with Iran — would agree to grant control over the strait.⁽⁴⁰⁾

The Strait of Hormuz, in particular, holds a special status, as it lies at the center of global power interests and plays a prominent role in influencing the global economy, the balance of power among major powers and their vital interests, as well as the regional and global balance of power. Accordingly, any change to the status of the strait directly conflicts with the global power structure and the network of interests, especially for the United States, which views the contest over the strait as significant in terms of its global hegemony and leadership, therefore a confrontation from which it cannot withdraw.

While China has indirectly benefited through Iran challenging Washington — prompting the United States to reduce the deployment of forces and vessels stationed in Southeast Asia, and even facilitating the collection of transit fees in Chinese yuan — these developments appear temporary and symbolic, with no structural impact on the global system of trade and power. China initially tolerated Iran's use of the Strait of Hormuz as a bargaining chip, but it may not accept any alteration to its legal status in the future.

The security of the strait, freedom of navigation and the uninterrupted flow of oil are vital to the Chinese economy, essential for its international trade and important for its strategic companies operating in the Gulf. The same applies to Russia, which is affected both positively and negatively by fluctuations in global energy markets. Both countries maintain balanced relations between Iran and the Gulf states and are unlikely to support any arrangement that would lead to the loss of key partners such as the Gulf states.

This assessment also extends to European countries, India and other powers dependent on Gulf oil and concerned with regional security and stability. These countries want to safeguard their investments and prevent further instability and chaos in the region, thereby reducing the risk of terrorism, violence and irregular migration.

The war has demonstrated Tehran's ability to disrupt up to 20% of global oil supplies, which the International Energy Agency described as “the largest supply disruption in the history of the global oil market.”⁽⁴¹⁾ This, in turn, has left Iran more isolated than ever before. The extent of the damage that disruptions to

trade through the Strait of Hormuz could inflict on countries worldwide is evident, beginning with Asian powers, which are among the most affected.

China imports approximately 40%–50% of its oil needs through the strait, India around 75%, Japan between 90%–95%, South Korea around 70%, Thailand between 60%–65%, and Pakistan between 60%–70%. Europe also relies on Gulf oil to varying degrees, ranking second only to Asia in terms of exposure. Greece leads with dependence ranging from 25%–35%, followed by France at approximately 10%–20%, Italy at around 20%, Poland at 15% and Germany at 5%–10%. The strait is likewise significant for countries in the Americas and Africa.⁽⁴²⁾

While most of these states, whose interests are closely tied to the security of the Strait of Hormuz, have rejected the US request to participate in protecting freedom of navigation through the waterway, they may nevertheless set aside their reservations — particularly those related to opposing Trump and his perceived unfriendly policies. They could either join Washington's approach to securing navigation through the strait or pursue independent measures to protect their interests, whether through collective cooperation or unilateral action.

In any case, these countries are determined not to allow the United States to reshape the situation in Hormuz and the broader region in a way that disregards their interests, especially after Washington imposed a naval blockade on Iran and began exerting control over passage through the strait.⁽⁴³⁾

International and regional powers may in the future limit Iran's ability to use the Strait of Hormuz as a bargaining chip. The United States is likely to be better prepared for any future confrontation, taking measures to restrict Iran's freedom of movement and its capacity to influence maritime traffic. This readiness for worst-case scenarios would not be confined to the United States and its allies, but could also extend to consumers of vital goods passing through the strait, including hydrocarbons, essential commodities and food supplies.

Similarly, Iran, which had hoped to overcome its pre-war isolation through the Gulf gateway, may find itself, following its actions in Hormuz and its attacks on Gulf states, facing greater regional isolation and potentially future confrontation. This is because its approach to Hormuz is not an issue that the Gulf states can easily tolerate. As a result, these countries may deploy all available capabilities, mobilize their alliances and use their leverage to deprive Iran of such control, turning Hormuz from a potential area of cooperation into a security instrument in managing their disputes.

Even Oman, which Iran has sought to engage to establish a new framework regarding the strait, may see limited benefit in closer cooperation, given that Muscat's foreign policy and regional and international positioning are based on balance and neutrality — an approach that could be undermined by alignment with Iran's policies on Hormuz.

The closure of the Strait of Hormuz has provided Tehran with unexpected financial gains by enabling it to sell oil. However, this Iranian strategy is not viable in the long term as the naval blockade currently pursued by Trump could evolve

into a more stringent policy, cutting Iran off from vital revenues and further weakening the establishment domestically.

This, in turn, could limit Iran's long-term capacity to withstand and respond to external pressure, particularly given Washington's apparent willingness to impose a prolonged blockade. Iranian revenues are expected to decline sharply, while the country would be unable to import essential goods. The economic losses could reach an estimated \$276 million per day due to reduced exports, alongside a \$159 million daily shortfall in imports — amounting to a total of \$435 million in daily losses, or approximately \$13 billion per month.

In addition, the value of the Iranian rial could deteriorate significantly, while alternative export routes outside the Strait of Hormuz are estimated to account for less than 10% of current capacity. Under these conditions, it would become practically impossible for Iran to sustain its strategy of economic resistance.⁽⁴⁴⁾

The policy of imposing mandatory transit fees and designated routes on ships may face significant challenges, as in peacetime customary international law and treaties — including UNCLOS, to which Oman is a party — do not provide for the imposition of excessive transit fees in straits. Although Iran has sought to coordinate with Oman to strengthen its position, the Omani minister of transport, following a meeting with the Iranian deputy foreign minister, publicly expressed opposition to the imposition of such fees. Accordingly, Iran may be unable to establish a new reality governing the Strait of Hormuz.

In addition, sanctions could be imposed on Iranian ports if the strait remains closed, further deepening the challenges facing the Iranian state, undermining internal stability, and potentially affecting the establishment's legitimacy and cohesion.

In summary, the establishment of a new legal regime for the Strait of Hormuz, or the imposition of a new reality such as transit fees, lacks legal legitimacy and cannot be achieved through coercion or force, particularly as the expected financial losses from such an approach would outweigh any potential revenue gains. Iran is in urgent need of de-escalating ongoing military and security tensions, lifting UN Security Council sanctions and building new international relations based on cooperation. It is therefore unlikely to benefit from restricting navigation in the Strait of Hormuz or imposing a *fait accompli* that would further compound its existing challenges.

Conclusion

The Iranian establishment is facing a decisive confrontation against the United States and Israel, compelling it to shift its military doctrine from defense to offense. Within this transformation, the Strait of Hormuz has emerged as its most important strategic card. The turbulence affecting the international system, the escalating competition among major powers, the intersection of competing interests in the Middle East and the high collective cost of closing the strait have all reinforced the significance and impact of this lever.

Although Iran has achieved notable gains through its control over navigation in the Strait of Hormuz — most importantly by acquiring a deterrent that helped prevent a war threatening the establishment's survival, and by securing a bargaining chip capable of moderating the US position and facilitating an agreement that preserves the establishment's image and ensures its continuity — it may still be unable to overcome legal complexities or impose a new reality on the strait in the future, or transform it into a sustainable Iranian asset.

This is due to the imbalance of power with the United States, which views freedom of navigation in the strait as central to its international standing, and which Trump, in particular, sees as having implications for his political future. Moreover, Iran may face consequences for seeking to impose a new reality that contradicts established international rules and harms the global economy as well as the interests of numerous international and regional actors, including the Gulf states, which are unlikely to accept such an outcome, as well as Iran's allies, who are themselves affected by disruptions to international trade through the strait, most notably China — especially after the adverse impact on global security and the economy, along with the risk of future shocks.

Endnotes

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