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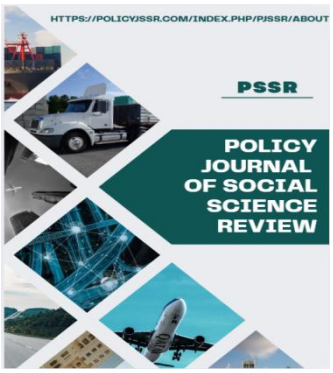

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THE GEOPOLITICAL ECONOMY OF CHOKEPOINT WARFARE: ASSESSING SECURITY INFRASTRUCTURE AND ENERGY SUPPLY CHAIN RESILIENCE IN THE 2026 HORMUZ CRISIS

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ABSTRACT

The 2026 crisis in Hormuz is a pivotal point of change in the development of maritime security and world political economy. This study looks into the case of the Dual Blockade of the Strait of Hormuz, when Iran single-handedly closed the waterway, followed by the counter-blockade by the West, as a paradigm shift in the chokepoint warfare. This paper explores the overlap between kinetic maritime threats and global energy and agricultural supply chains resilience using a qualitative-descriptive research design. The paper concludes that the combination of asymmetric technology, such as Unmanned Surface Vessels (USVs), smart mines and GNSS jamming, has rendered traditional naval deterrence models obsolete. Moreover, the crisis shows that the critical infrastructure, including desalination and port facilities, is increasingly a target in maritime conflict not only due to energy-related issues but according to the Fertilizer-Food-Energy Nexus. The study adds to the body of literature by reconstituting the concept of maritime security in an ecocentric fashion, in that post-hegemonic maritime governance has to discontinue force-projection as the means of its operations, but instead such governance should target the systemic protection of critical infrastructure. The results of the study indicate that the combination of economic leverage and the tactical security infrastructure in the war on the grey zone presupposes a radical change in the international maritime standards and global supply chain risk management.

Keywords: Strait of Hormuz, Chokepoint Warfare, Global Political Economy, Maritime Security, Asymmetric warfare, Energy Resilience, Green Theory, Dual blockade.

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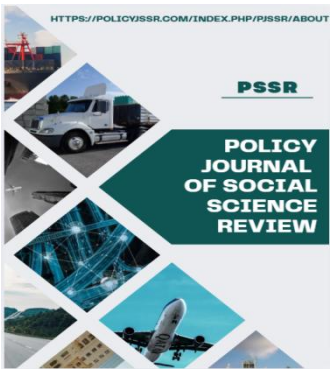

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Background

It has been long established in the international security literature that the Strait of Hormuz is the most crucial oil transit point in the world. In the past, this waterway 21 miles wide has transported about 20 to 21 million barrels of liquids (petroleum) per day- about a fifth of the world- many tons of Liquefied Natural Gas (LNG), especially Qatari (EIA, 2025a; Sangwa et al., 2026). The occurrences in early 2026 have however changed the Strait to become more of a controlled strategic hazard to an engaged theater of Dual Blockade warfare, shattering core of the Liberal International Order (LIO).

The existing crisis was triggered on February 28, 2026, when there were a series of kinetic escalations in the Persian Gulf. The Islamic Revolutionary Guard Corps (IRGC) virtually shut down the Strait to commercial traffic by March 1, 2026, stating that it needed to protect Iranian sovereignty against foreign attacks (Agroberichten Buitenland, 2026). This unilateral closing was answered with a Western-led counter-blockade of Iranian port facilities, which has put the regional maritime economy on hold. The 2026 crisis is marked by the incorporation of asymmetric technologies, such as Unmanned Surface Vessels (USVs) and smart mines and pervasive GNSS jamming, which makes traditional Freedom of Navigation (FONOP) operations ineffective in securing trade, unlike in the past (Reuters, 2025; Sangwa et al., 2026).

Problem Statement

The 2026 Hormuz crisis reveals a severe weakness in the modern worldwide political economy, the instability of so-called just-in-time energy and food systems to a localized maritime conflict. Although the U.S. has been making decades-long security assurances in the Gulf, the ongoing blockade shows a structural inability of the current deterrence paradigms to work. Low-cost, high-impact asymmetric strategies have neutralized traditional naval dominance and do not only jeopardize the flow of crude oil, but the whole Fertilizer-Food-Energy Nexus (Sangwa et al., 2026).

Although a bulk of the available literature has been concerned about the cost of Brent crude, the 2026 crisis is a more sinister challenge to global stability. The cut-off of Qatari LNG exports has caused the second outbreak in the world market of nitrogenous fertilizers, which have caused a 40-60 percent spur in the price of agricultural inputs (Agroberichten Buitenland, 2026). This bullwhip effect poses a threat to food security of the import-dependent countries in Africa and Asia, and proves that the Strait of Hormuz is not just an energy chokepoint anymore, but a survival-valve. This inability to defend this infrastructure implies that the international community needs to redefine

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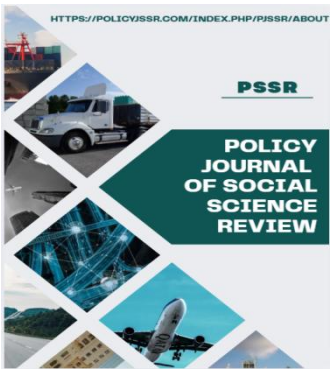

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maritime security as a wide governance role, instead of a strictly kinetic military aim (United Nations, 2025).

Research Questions

This study is informed by the following questions to measure the structural changes by this crisis:

1) What has 2026 Hormuz crisis done to redefine the definition of chokepoint warfare in the 21st century?

2) How is the current security infrastructure in place inadequate in preventing energy supply chain disruption?

3) What are the resilience strategies that are being implemented by world actors to reduce the economic effects of the blockade?

Importance of the Research

The research can be important to academics of the Political Science community as well as policy-makers because it chronicles a paradigm shift in international relations: the move to traditional naval presence to asymmetric, infrastructure-based security. The existence of aircraft carrier strike groups was considered adequate to promote maritime security since many decades ago. The 2026 crisis demonstrates that the use of high-value naval capabilities against the attack of key nodes, such as desalination plants and port infrastructure, can be an effective way to counter the high cost of the target (Agroberichten Buitenland, 2026; Reuters, 2025).

In addition, the paper treats the topic of Geopolitical Fragmentation of the energy markets. With states both within and beyond the U.S security domain taking different trajectories - some building fuel supplies through the shadow fleets and others speeding up green energy transitions - the nature of global interdependence is being rewritten (Voeten, 2026). With a qualitative perspective on the 2026 crisis, the study presents a blueprint to establish an ecologically governed and resilient infrastructure-based approach to maritime security known as Post-Hegemonic maritime security.

II. Literature Review

The 2026 Hormuz crisis requires a re-consideration of the existing academic literature on the topic of maritime security, economic geography, and international relations (IR) theory. To realize the shift in the conventional naval presence to the asymmetric infrastructure-based security, it is important to trace the development of chokepoint theory and the way it intersected the modern global political economy (GPE).

The naval strategists of the late 19th and early 20th century dominated traditional views of maritime bottlenecks. A successful argument was made by Alfred Thayer Mahan (1890) who maintained that sea power was the chief determinant of national greatness by arguing that the key to hegemony was to control strategic

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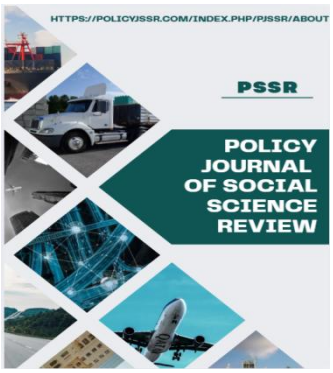

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marine passages. Equally, Julian Corbett (1911) stressed on the significance of maritime communications and suggested that the main role of a navy was not always to annihilate the opponent fleet but to ensure the control of the sea to trade. The Strait of Hormuz is a challenge, to a challenge to be overcome by conquering kinetic force. The new academic focus has however shifted to a Global Political Economy (GPE) of Chokepoints. Now, scholars believe that chokepoints are not a geographic phenomenon, but nodes of systemic power in a globalized network (Khalili, 2020). Modern chokepoint theory acknowledges the weaponization of interdependence, as opposed to the battlefleet of a rival state, which was the threat during the Mahan era. States can leverage the position they have in international networks (financial, digital, maritime) to provide coercive pressure as Farrell and Newman (2019) suggest. The Strait of Hormuz is examined in the context of the 2026 crisis not only as a transition zone between the sovereignity of states and the capital flows around the world, but also as a military passage (Sangwa et al., 2026).

The maritime security infrastructure literature has recorded a tremendous shift of kinetic naval power, which was embodied by Carrier Strike Groups and destroyers, to cyberized maritime domain awareness (MDA) and automated defense mechanisms. Historically, the Persian Gulf was kept secure by means of so-called Freedom of Navigation Operations (FONOPs), which were based on the apparent presence of large-scale naval capabilities to prevent aggression (EIA, 2025a). In the recent research, it has been emphasized that there is a democratization of destruction on the sea. The emergence of Unmanned Surface Vehicles (USVs), inexpensive suicide drones, and advanced sea mines have placed the upper hand to the asymmetric player formerly in the prestige navy (Reuters, 2025). This virtualized space has given rise to a new security architecture whereby pervasive sensing and GNSS jamming are considered equally vital as the conventional firepower. The 2026 Dual blockade can be used as an initial case study of what researchers have described as a form of warfare, known as the Grey Zone, in which the goal is to disrupt commercial infrastructure without causing full-fledged warfare to an extent below the threshold of a full-fledged war (Voeten, 2026).

Traditionally, in academic literature, the concept of energy resilience has been based on two pillars, namely diversification of energy sources and Strategic Petroleum Reserves (SPR) maintenance. Nevertheless, with the crisis of 2026, the emphasis has changed to that of supply chain elasticity. In the modern literature, the so-called Supply Chain Bullwhip Effect is also a

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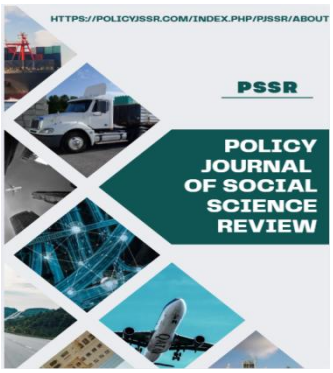

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warning that a localized event in a central node (such as the Strait of Hormuz) leads to exponentially greater changes in the downstream markets (Sangwa et al., 2026). Past studies of the 1980s Tanker War gave little attention to the oil other than crude oil. The current studies in question concentrate on the Fertilizer-Food-Energy Nexus in the given research. The halt of the exports of Qatari Liquefied Natural Gas (LNG) are not just an energy crisis but a food crisis. It has been noted in the literature on agricultural economics that fertilizer production, specifically nitrogenous fertilizers, is extremely gas-intensive; hence, Hormuz closure is a supply chain multiplier that affects the calorie supply in the world (Agroberichten Buitenland, 2026). This requires a shift in the Just-in-Time logistics to Just-in-Case strategic stockpiling of energy as well as agricultural inputs (United Nations, 2025).

Lastly, the literature on nexus of security and economy discusses how the world markets are determined by the geopolitical instability. Contrasting the 20th-century paradigm in which markets responded largely to the supply-demand fundamentals, modern GPE academics believe that the so-called geopolitical risk has become a structural aspect of the global finance. Studies indicate that maritime chokepoints generate a risk premium which not only influences the price of commodities but also insurance premiums, shipping routes, and world inflation (Sangwa et al., 2026). The 2026 crisis has institutionalised what some have referred to as geoeconomic fragmentation in which the world has been divided into competing energy blocs. In the current scenario, infrastructure is no longer the neutral route of trade, but a so-called strategic lever with the help of which states redefine their role in the international pecking order (Voeten, 2026). The implication of this interaction is that international security can no more be examined separately of the global political economy in which the security of the infrastructures is the security of the economy.

III. Theoretical Framework

To examine the Hormuz crisis of 2026, one will have to go beyond a single theoretical perspective. The "Dual Blockade" is not just a military operation, it is a deep-seated change in the world system of circulation. The framework that is used in the current study combines Geopolitical Economy (GPE) with the traditional opposition between Neo-Realism and Liberal Interdependence. A combination of these views allows us to see how the interests of the states that are dominated by security clash with the interests of the markets that are dominated by dependencies and restructure the international order.

This study is mainly based on the Geopolitical Economy (GPE). In contrast to conventional International Political

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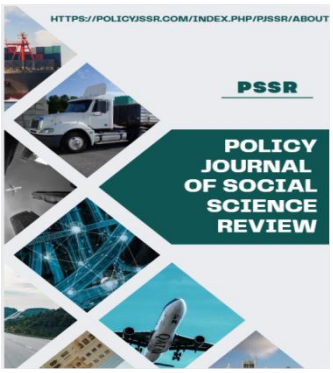

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Economy (IPE), which tends to keep the realms of politics and economics separate, GPE assumes that the state and the market are closely intertwined in a hierarchical world of competition on a global scale (Desai, 2013). As applied to the Strait of Hormuz, GPE can be used to examine how the blockade can be viewed as a spatial fix wherein states engage in territorial control to impact capital flows around the world.

The action of the Iranian state in the 2026 crisis of shutting down the Strait was not only a military defensive action, but an act of weaponized interdependence (Farrell & Newman, 2019). A state is able to take the global energy and fertilizer supply chains hostage by controlling a physical chokepoint, and thereby renegotiate geopolitical status. This illustrates the GPE principle where security interests are usually motivated by the necessity to safeguard- or interrupt- economic accumulation. This is also exemplified by the Western counter-blockade of Iranian ports, which was a measure to make the economy as a security instrument, demonstrating that in the XXI century, the port and the battleship are two sides of one coin (Khalili, 2020).

The 2026 crisis is a laboratory of crisis with high stakes as Neo-Realism and Liberal Interdependence debate. Neo-Realist wise, the shutting down of Strait of Hormuz is a logical, although drastic, reaction to the dilemma of security. To Neo-Realists such as Kenneth Waltz (1979), international system is anarchic and states have to ensure survival before all other things. Early 2026, when the tension between Iran and Israel were on the brink of turning the so-called Shadow War into a blatant one, the action of Iran was a typical offensive-defensive one. The control of the chokepoint also aimed to balance its traditional military weakness by using asymmetric geographic strength, Tehran.

The blockade in this worldview is a zero sum game. When Iran is able to cripple the energy flows that underpin the order headed by the West, it enhances its relative power. The Neo-Realist prism is the reason why deterrence did not work: in the case when a state feels an existential threat, the rationality of the economic stability is given up in favor of the immediate need to survive. The 2026 crisis substantiates the realist infringement that international institutions and sea norms (such as UNCLOS) are weak scraps of paper in dealing with hard power of state interests.

On the other hand, the Complex Interdependence theory (Keohane and Nye, 1977) claims that the world is highly integrated to an extent that the costs of such blockade should be prohibitively high to all including the blockader. According to liberal theorists, trade gives rise to a peace interest as states have little incentive to dismantle the same systems which furnish them with revenue and resources.

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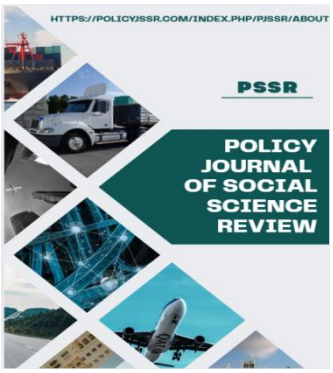

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The 2026 Iran -U.S. Israel crisis on the contrary, suggests a Liberal Paradox. Although Iran is so interconnected with some networks in the world (as in the case of the oil exports to Asia, the so-called shadow fleet), it was not as vulnerable to the conventional liberal norms because it could not access the Western financial system. The crisis shows that the interdependence is mostly not symmetrical. To importing countries in South Asia and Europe, food and energy security is an existential threat due to the blockade. To the countries, the halting disruption is a sign of insentient. The Dual Blockade is basically a contest of who is able to bear the agony of being disconnected the longest.

The combination of GPE, Neo-Realism and Interdependence results in new conceptualization of Strategic Autonomy. States do not feel satisfied with the blind interdependence in the post-2026 landscape. Instead, they are heading towards "Resilient Interdependence in which the security of infrastructure takes priority over market efficiency. This conceptual synthesis describes why there is a transition to infrastructure-based security. When it becomes possible to close down the Strait of Hormuz using low-cost drones and mines, then the Liberal notion of a free trade is as sound as the physical safety of the chokepoint. The Iran -U.S /Israel crisis of 2026 has compelled a shift in which the Invisible Hand of the market has been substituted with the Iron Fist of state protection of infrastructure. This is especially clear in the rush to bypass pipelines and desalination security in the GCC states both of which are realist (survival) and GPE-motivated (defense of the economic base) actions. In the results, the 2026 Hormuz crisis demonstrates that it is the geopolitics engine of the economy and not its interests. This paper is able to evaluate qualitatively the rewriting of the rules of engagement by the "Dual Blockade" by applying a Geopolitical Economy framework. The clash of the realist desire to have power and the liberal desire to have trade has produced the new reality of the Gray Zone where the main battlefields of the 21st century are made up of chokepoints.

IV. Research Methodology

The proposed research is aimed at exploring the systemic changes in the global security and economic strength that will occur due to the 2026 Hormuz crisis. In order to understand the complexity of an ongoing "Dual Blockade" the research takes an approach that places greater emphasis on the qualitative depth, and less emphasis on the quantitative breadth, which is the logic of strategies used by the actors and the systemic vulnerability of the global infrastructure. The study employs a qualitative-descriptive design, which focuses on the Strait of Hormuz crisis of

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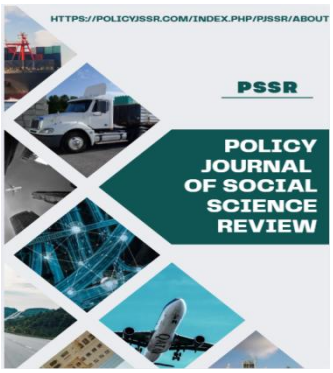

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2026 as one, instrumental case study. The reason behind this design is that the crisis was a one-of-a-kind or a one-of-an-extreme case in maritime history the first such action in a simultaneous blockade/counter-blockade, using modern asymmetric technology.

Through the use of a descriptive method, the research aims to give a chronological and thematic narrative of the crisis. This is not only to report, but to tell how and why the maritime deterrence did not succeed. A single-case study approach can be used to achieve an in-depth analysis of how military operations (e.g., the deployment of sea drones) relate to economic impacts (e.g., the disintegration of the fertilizer chain), which gives a more holistic perspective that a multi-case study can blur.

Strategies of Data Collection: Triangulation Secondary Sources.

Due to the lack of safe access to the conflict region to collect primary data, this research is based on the triangulation of Secondary Sources. This is done by collecting evidence based on several independent groups of information so that the results would be balanced and confirmed. The cross-referencing of various kinds of sources will help the research to reduce the chances of state-sponsored bias or information warfare typical of maritime conflicts.

The collection of data is split into three different pillars:

1) Energy and Economic Reports of Institutions.

The analysis collects technical information of the large international monitoring organisations, mostly the International Energy Agency (IEA) and OPEC. These reports give the empirical basis of the study, the exact volumes of oil and LNG that are diverted out of the Strait, the changes in the global "Strategic Petroleum Reserves" and the ensuing volatility in the energy and agricultural sectors. It is these documents that are employed in determining the material reality of economic effect of the blockade.

2) Maritime Security Briefings and Technical Briefings.

The study uses short-term briefings of private maritime security companies and open-source intelligence (OSINT) analysts in order to study the security infrastructure. Such data will consist of satellite pictures of tanker groups, electronic warfare (GNSS jamming) incidents, and port facility damage. These sources offer the tactical detail that is needed on how asymmetric warfare was able to counter traditional naval presence in the crisis.

3) Diplomatic/Policy Documentation.

The last pillar is comprised of "Official State Communications." It entails the transcripts of the United Nations Security Council meetings, the official press releases of both Iranian and U.S. foreign ministry as well as the domestic policy reaction of

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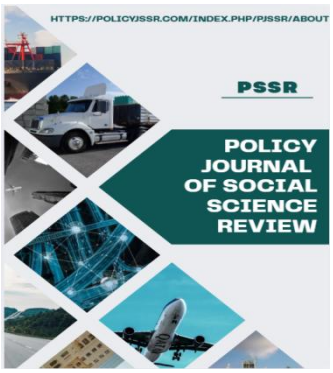

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the GCC states. The analysis of these documents will help the study find the legal and political rationales behind both parties of the dispute in the "Dual Blockade" and monitor the development of the maritime security policy in real time.

Data Analysis Technique

Data analysis of the acquired data is performed with the help of two main qualitative methods: Policy Analysis and Thematic Coding.

1) Policy Analysis

The paper discusses the effectiveness of international maritime laws and international security agreements. The discussion is on the gap between current standards (including the right of innocent passage) and the fact of the 2026 blockade. The study focuses on analyzing how states are responding, including the development of ad-hoc naval escorts or hastening the completion of bypass pipelines, to determine which policies are winning and which have failed the pressure of the so-called Chokepoint Warfare.

2) Geopolitical Risk Thematic Coding.

The study employs Thematic Coding to help synthesize the huge quantity of information. The information is summarized into themes that recur and characterize the crisis. These include:

Asymmetric Vulnerability: There have been cases of low cost technology defeating high cost security assets.

- Infrastructure Weaponization: A non-military infrastructure such as desalination plants is targeted.

Nexus of Energy and Food: The particular connection between LNG transit and global food security.

- Post-Hegemonic Governance: The change of unitary security to fragmented or multilateral security structures.

V. Analysis: Security Infrastructure and Chokepoint Warfare

The Hormuz crisis of 2026 has completely changed the nature of maritime conflict warfare. The long history of traditional naval supremacy of carrier strike groups and heavy surface combatants have now faced a technological glass ceiling in which the cost of defense is now much greater than the cost of disruption. This part examines how the traditional naval conflict changes into the asymmetric chokepoint conflict, the use of unmanned systems and the strategic change of targeting the civilian infrastructure.

Asymmetric Threats: GNSS Jamming, USVs and Smart Mines.

The first mass-driven conflict of the 2026 world war is the Dual Blockade which is characterized by the mass usage of Unmanned Surface Vehicles (USVs) and autonomous sub-surface resources. As opposed to the visible naval ships and conventional missiles that were used in the "Tanker War" of the 1980s, the current

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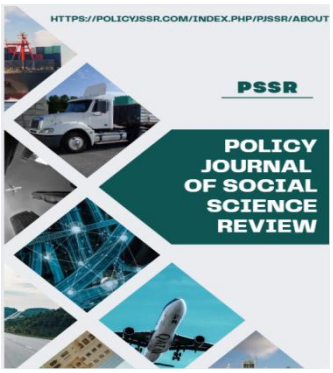

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crisis employs the use of swarm intelligence to saturate maritime transit.

- Unmanned Surface Vessels (USVs): The IRGC has successfully used low-profile, high-speed suicide USVs to attack commercial tankers. They are usually built of fiberglass, so they have lower radar cross-sections, and cannot be easily tracked by the standard Aegis-equipped destroyers in the crowded and busy waters of the Strait. By mid-March 2026, it was reported that more than twenty commercial vessels had been hit by USV swarms, effectively leading to a complete withdrawal of war-risk insurances in maritime (JMIC, 2026; Sangwa et al., 2026).

A Smart Mines: The spread of so-called smart mines, which can identify an acoustic or magnetic signature, has transformed the two-mile-wide shipping lanes into a deadly mine field. These assets may be programmed to avoid military escorts and focus on particular vessel profiles, like VLCCs (Very Large Crude Carriers), unlike traditional "dumb" mines, and the possibility of clearing the Strait becomes a months-long effort, rather than a tactical one (INSS, 2026).

So, one of the most disruptive asymmetric tools, maybe has been the ubiquitous Electronic Warfare (EW). In March 2026, over 600 major GNSS outages were recorded per 24 hours (JMIC, 2026). Actors have caused commercial vessels to unintentionally stray into either territorial waters or navigational risks by spoofing GPS signals, causing them to form so-called AIS anomalies and becoming useless to automated navigation systems and the risk of colliding with commercial vessels in the congested waters beyond the blockade zone rises.

The Failure of Deterrence: Obsolescence of FONOPs.

The Freedom of Navigation Operation (FONOP) was decades the gold standard of maritime deterrence. The idea was simple, high-tech naval power via a disputed sea passage a hegemon could demonstrate its intentions and discourage interference. But the 2026 crisis has revealed what the model has always been: systemically flawed in an era of asymmetric warfare.

The classical deterrence was unsuccessful due to three main reasons:

Cost Asymmetry: Operation Epic Fury by the U.S. made use of multi-million dollar interceptors to strike down less than 20000-dollar drones and USVs. This economic attrition implied that even when 95% of the threats were caught, the remaining 5% that got to the target caused a strategic win by pushing insurance premiums to unrealistic levels (Research Gate, 2026b).

Lawful Ambiguity: Once the tactics of the Gray Zone were employed, including VHF warning announcements and insurance-driven shutdown instead of a full-fledged military blockade, Iran managed to obtain

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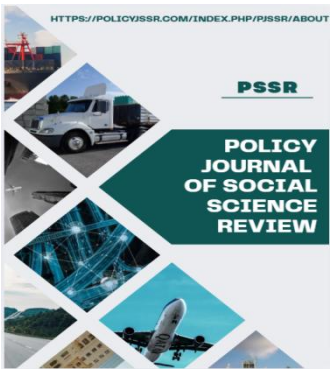

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a de facto blockade without offering a definite casus belli in response to such a move (Research Gate, 2026b).

Credibility Erosion: Deterrence is based on a threat of unacceptable costs. In 2026, it was demonstrated that the readiness of regional actors to take kinetic attacks in order to have the entire Western energy order shattered to the ground, which signified that conventional "coercive diplomacy" had come to a head (Research Gate, 2026a).

Infrastructure Targeting: Water is a Weapon of War.

Another significant and disruptive change in the 2026 crisis is the shift of targeting combatants to targeting critical civilian infrastructure, desalination plants and port facilities to be specific. It is a step towards a completely totalized "Geopolitical Economy of Conflict" in which the survival of the civilian population becomes a strategic bargaining chip.

In early March 2026, there were strikes against desalination plants in Bahrain and Iran that resulted in a disruption of water to millions of people, emphasizing the high risk that the GCC's "Saltwater Kingdoms" are (Geneva Water Hub, 2026). Since in urban areas, 90 percent of the municipal drinking water is obtained through the seawater desalination processes in Abu Dhabi, Doha and Dubai, the new targets are the high-value targets.

This is actually a two-fold purpose targeting strategy in the warfare of the grey zone:

Humanitarian Leverage: An actor can leverage the threat to water security of a whole region to induce international pressure to insist on a ceasefire on conditions favorable to the actor.

Economic Paralysis: Ports cease to be merely seaports; they are logistical centres. The 2026 port infrastructure attacks in the North of Jebel Ali and the area of Al Basrah on the stationary vessel and ship-to-ship (STS) transfer zones, practically paralyzing the economy of the region, and making it impossible to use bypass land routes (JMIC, 2026).

This implies that maritime security now has to take into consideration Hydro-Politics due to the normalization of infrastructure targeting. With international law striving to keep pace with these indiscriminate strikes, the defence of the desalination-energy nexus has become the main axis of the national defence in the Gulf.

VI. Analysis: Resilience in Energy Supply Chain.

The Hormuz crisis of 2026 has ceased to be a localized maritime skirmish and it has been turned into a systemic shock to the global political economy. Herein lies an analysis of the disastrous failure of the just-in-time energy model, the following agricultural industry contagion, and the physical constraints of available bypass

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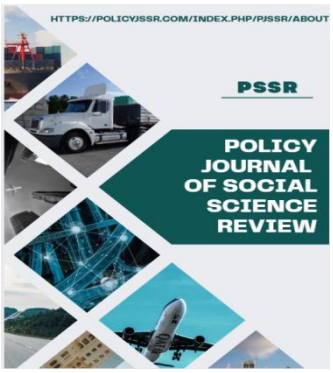

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infrastructure to counteract a complete clogging of the choke point.

The Price of Blockade: LNG and Brent Crude Volatility.

The direct outcome of the so-called Dual Blockade has been a decoupling of the energy prices as based on the traditional supply-demand fundamentals and the emergence of a so-called geopolitical risk premium of unprecedented levels. During the initial forty-eight hours of the March 1st shutdown, Brent crude soared by a relatively steady level of $78/barrel to an all-time high of $134/barrel, with global market valuing the loss of about 21 million barrels per day of petroleum liquids (IEA, 2026).

The 2026 crisis has experienced a prolonged high-price environment, unlike the past, where Strategic Petroleum Reserves (SPR) have been depleted, globally. The IEA (2026) member countries had to organize an unprecedented amount of 120 million barrels released in April to avoid a complete collapse of industries in Europe and East Asia. Nevertheless, the LNG spot prices have been even more volatile in the increase. European Title Transfer Facility (TTF) prices soared more than 200 per cent in three weeks when the Qatari LNG exports were halted via the Strait. In the cases of other countries, such as Japan and South Korea, which depend on the Strait to supply almost one-third of their natural gas, the blockade has compelled them to switch to emergency energy rationing, demonstrating how crucially vulnerable the globalized gas trade is (Sangwa et al., 2026).

Disruption of Secondary Markets: The Fertilizer-Food Nexus.

The most pernicious of the 2026 crisis ripple effects is the breakdown of global fertilizer supply chain. Qatar is not just an energy powerhouse, but also one of the major urea and ammonia exporters in the world today, which are major inputs to the world agriculture. Forcing the closure of maritime navigation via Hormuz has practically left about 15 percent of the world supply of nitrogenous fertilizers out of the market (Agroberichten Buitenland, 2026).

South Asian food security has been acutely affected. The 400% rise in the price of the urea fertilizer has caused a 15-20 percent reduction in the 2026-2027 agricultural crop cycle in Pakistan and India, where subsidies on chemical fertilizers are intensively relied upon to promote agricultural production. European farmers have also been experiencing the same input shocks where agricultural production is economically no longer viable in a number of EU member states due to the loss of Qatari gas to produce domestic fertilizer (in combination with the import blockade) (Sangwa et al., 2026). The so-called bullwhip effect, in which an energy shock in the Gulf results in a calorie crunch in the Global South, proves that Strait of

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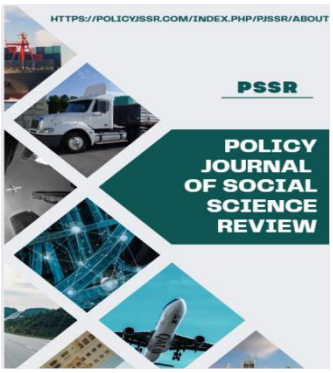

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Hormuz is indeed the main food security valve of the world.

Bypass Infrastructure: Assessment of Habshan-Fujairah Pipeline.

With the second month of the blockade, the global resilience efforts became more land-based bypass infrastructure. The major resource in this context is the Habshan-Fujairah Pipeline (the Abu Dhabi Crude Oil Pipeline or ADCOP) that will enable the UAE to ship oil straight to the Gulf of Oman and avoid the Strait of Hormuz altogether.

Although in theory the pipeline could carry 1.5 to 1.8 million barrels per day, the practicality of the pipeline in the case of a long-term blockade has been constrained by two factors:

Capacity Constraints: The Habshan-Fujairah line and the East-West Pipeline (Petroline) of Saudi Arabia can only accommodate a small part of 21 mb/d, which passes through the Strait. These lines can only compensate the lost volume of about 25-30% even at full capacity (IEA, 2026).

Infrastructure Vulnerability: As the East-West pipeline experienced "Grey Zone" intensified in late March, satellite imagery showed that long-range suicide drones were attacking pumping stations, proving that even the land-based bypass routes are as much vulnerable to asymmetric attacks as the maritime chokepoints (Reuters, 2025).

These pipelines have not been able to stabilize the world prices which means that infrastructure resilience cannot be done by the alternative routes alone. Rather, the 2026 crisis has demonstrated that, as long as the major production nodes are based in a high-conflict zone, the global political economy continues to be structurally susceptible to chokepoint warfare.

VII. Discussion: Policy Implications and Global Re-alignment.

The 2026 Hormuz crisis has served as a force to a radical re-ordering of the international system. The so-called Dual Blockade did not simply disrupt trade, but revealed the institutional staleness of the post-Cold War maritime security architecture. This part concerns the context in which the world has become dominated by post-hegemonic security environment, radical strategic autonomy of energy-importing states, and the looming legal crisis of United Nations Convention on the Law of the Sea (UNCLOS).

Post-Hegemonic Security: Multilateralism and Regionalism.

The security of the Persian Gulf was based on the Carter Doctrine that had defined that any move by an external power to take control of the Gulf region would be considered an attack against the vital interests of the United States, a move that had been in place since almost eight decades. Nonetheless, the inability of the Operation Epic Fury to decisively reopen

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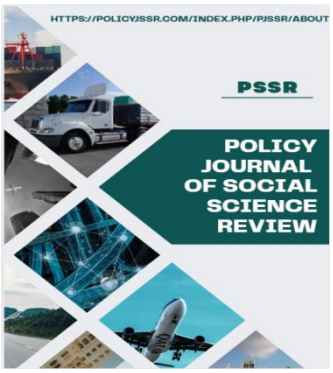

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the Strait in March 2026 has heralded the demise of this unilateral security assurance. Now we are moving towards the post-hegemonic security, with two different trends:

The Emergence of Multilateral Escort Coalitions: As U.S. naval capabilities have been shown susceptible to asymmetric warfare of the so-called cost-attrition, energy-importing countries, including but not limited to China, India, and other members of the EU, have started to deploy their own sovereign naval escorts. This has resulted in the creation of a disjointed maritime space in which the common no longer rests under the authority of a single hegemon but a patchwork of conflicting national interests. The 2026 crisis has demonstrated that security is no longer a public good offered by Washington but a personal need which can be bought in bilateral naval diplomacy (Voeten, 2026).

Localization of the Security in the Region: The GCC states, having understood that their coastal infrastructure cannot be secured by some external forces, have stepped up the process of creating a so-called Regional Maritime Shield. This includes substantial investment in automated coastal defense, localised anti-drone domes, and autonomous maritime domain awareness (MDA) systems. The policy implication is obvious: regional players are shifting to the so-called self-help paradigm that will diminish their dependence on the classic Western security umbrella.

Strategic Autonomy: Decoupling and Restructuring of Supply Chains.

The 2026 crisis has transformed Strategic Autonomy into a political slogan into an issue of national survival. States that are energy importers especially in the European and East Asian regions have come to the realization that their reliance on the Strait of Hormuz is a single point of failure to their whole civilization.

This awareness is leading to a radical re-organization of world supply chains:

Hormuz Bypass Strategy: Japan and South Korea are active in diversifying their energy supply beyond the Gulf. This involves long-term agreements with Atlantic-basin producers and hastened transition to nuclear and renewable energy. The policy is to ensure that by 2030, the percentage of energy that should be flowing through the Strait is less than 40% as compared to the current 80% (IEA, 2026).

Near-Shoring of Critical Inputs: The disruption of the Fertilizer-Food-Energy Nexus has necessitated states to begin to near-shore the manufacture of agricultural inputs that are of critical importance. Governments of Europe and South Asia have come to subsidize the building of local green ammonia facilities, with electrolysis using local renewables instead of imported Qatari gas. This is a radical

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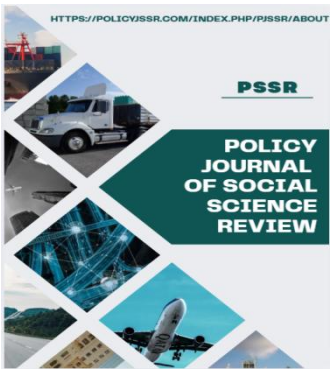

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transformation of globalized efficiency to local resiliency (Sangwa et al., 2026).

The Crisis in the Future of the Maritime Law: UNCLOS.

Lastly, the United Nations Convention on the Law of the Sea (UNCLOS) is at a breaking point due to the 2026 crisis. The main legal conflict is interpreted as the meaning of Innocent Passage.

Ships of all states have the right of innocent passage through the territorial seas under UNCLOS Article 17. Nevertheless the de facto closure of the Strait by the IRGC under the pretext of a security need against hostile reconnaissance by drones, has abused important loopholes in the convention.

- The Drone Dilemma: UNCLOS makes no specific claim regarding the status of the Unmanned Surface Vessels (USVs) or autonomous drones. Do these "vessels" have the right to innocent passage? Or are they weapons such as to justify the passage suspension?
- The Security Exception: The 2026 crisis witnessed Iran and other actors in the region invoke Article 25, where an innocent passage can be suspended temporarily, but the suspension is necessary in the best interest of the security of the coastal state. The uncertainty of determining an essential threat in the era of asymmetric warfare has virtually crippled the legal power of the UN (INSS, 2026).

The implication of the policy is an increased need of a UNCLOS III or a special Protocol on Maritime Chokepoints. In the absence of an updated legal framework, which takes into consideration unmanned technology and infrastructure-based warfare, the "Rule of Law" at sea will keep being substituted by the "Rule of Power" and the global chokepoints will get permanently militarized.

VIII. Conclusion and Recommendations

Summary of Findings

The Hormuz crisis of 2026 has already rewritten the book of conventional naval dominance that the world has long lived in, shifting the world into the period of integrated chokepoint warfare. This study has shown that a chokepoint is not just a geographic point of constriction to be defended; it is also a multidimensional point of control that combines tactical security infrastructure with the economic vulnerabilities of the world. The Dual Blockade demonstrated that the relatively low-price asymmetric arsenal consisting of unmanned surface vehicles, signature-sensitive mines and ubiquitous electronic warfare can be effective in countering the billions-of-dollars platforms of a conventional blue-water navy.

This paper has identified three important changes. To start with, the ratio of costs-to-disruption has switched against the asymmetric actor, and conventional "Freedom of Navigation Operations" is no

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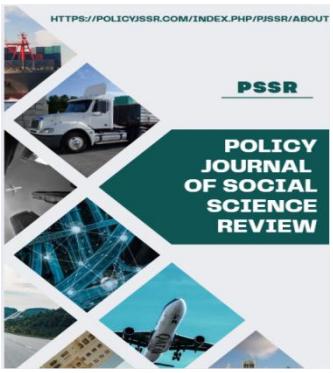

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longer viable against attrition-based warfare. Second, the crisis demonstrated the so-called Fertilizer-Food-Energy Nexus, whereby a maritime crisis in the Persian Gulf is immediately reflected in the lack of calories in far-off areas, like South Asia and Europe. Lastly, the study recognized the so-called infrastructure-security trap of land-based circumventions such as the Habshan-Fujairah and Petroline pipelines that are equally susceptible to precision guided attacks in the so-called Grey Zone as the sea corridors themselves. Finally, the 2026 crisis will mark the entry of a post-hegemonic maritime order where security will be disaggregated, localized, and will be inseparably tied to the existence of critical civilian infrastructure.

Policy Recommendations

To manage this emerging reality, the international community, regional states and individual stakeholders have to shift away of reactive deployments by the military and towards a proactive system of structural resilience. The following proposals can be seen as a pathfinder towards the post-2026 maritime environment.

Harden Maritime Infrastructure International Investment.

The weakness of desalination facilities and port terminals during the crisis demonstrated that civilian facilities are the new front line. These assets must be hardened by consideration in future maritime policy. This involves:

The Saltwater Shield: GCC countries and other maritime countries need to invest in decentralized, underground, or armored intake systems of desalination and energy cooling. States can decrease the strategic value of targeting in the "Grey Zone" by making these nodes less visible and their location more inaccessible.

- **Automated Point-Defense Systems:** High-powered microwave (HPM) array and acoustic dazzlers should be installed as automated, non-kinetic defense layers at ports and other critical terminals, and are capable of countering USV and drone swarms without high-cost missile interceptors.

Introduction of a Global "Maritime Crisis Data Hub.

The GNSS jamming that led to electronic blindness and the information warfare that had surrounded the dual blockade clearly showed that there was a dire need of clear, objective information.

- Real-Time Supply Chain Transparency: An open, multilateral, open-source, global Data Hub under the IMO, or a group of energy-importing countries, ought to be created. To monitor cargo movements, AIS anomalies, and incidents in the Grey Zone in real-time, this hub would use a blockchain-verified ledger.
- Counter-Spoofing Protocols: The Hub must offer a non-satellite, redundancy

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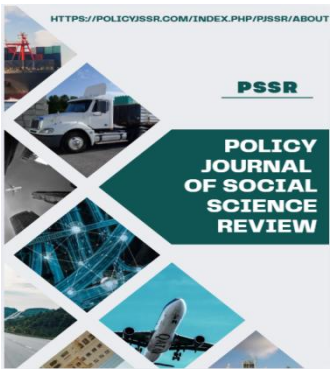

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positioning source (e.g.: e Loran) to commercial ships navigating in high-risk chokepoints. The international community can avoid the localized jamming that led to the crisis in 2026 by supplying such data, known as ground truth, which cannot be locally jammed and cannot cause the legal seizures and navigational crashes that caused the crisis.

Strategic Buffer Synchronization

The Fertilizer-Food-Energy Nexus demonstrated that energy-importing states can no longer afford to deal with energy and food security as two silos.

- Integrated Reserve Management: States should co-ordinate their Strategic Petroleum Reserves (SPR) with Strategic Fertilizer Reserves. By making sure that agricultural inputs are stored together with fuel, the bullwhip effect of causing social instability in the event of disruption of the maritime will be avoided.

Policy: It should not be market-based sourcing, but security-based sourcing, with shorter, land-based supply chains or domestic ammonia production based on electrolysis that is not trans-chokepoint based.

To sum up, the 2026 Hormuz crisis is a reminder that the world circulatory system is weak. To maintain global stability, the world needs to shift off of the declining naval hegemonies into a new model of eco-centric Governance and Technological Resilience, where protection of critical life-sustaining infrastructure is the main measure of national and international security.

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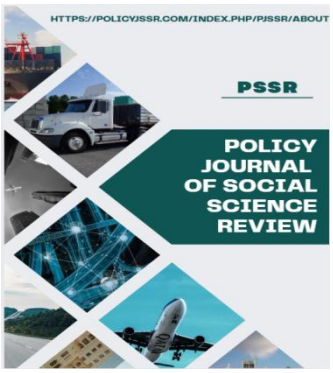

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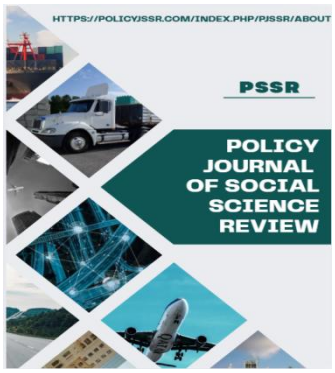

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