Securing the Strait of Hormuz: A Politico-Military Assessment

Edition 1 – 25 March 2026

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Executive Summary

The closure of the Strait of Hormuz by Iran's Islamic Revolutionary Guard Corps, triggered by the US–Israeli Operation *Epic Fury* on 28 February 2026, represents the most severe disruption to global energy flows since the 1973 oil embargo. Approximately 20 million barrels of oil and 20 per cent of global liquefied natural gas exports normally transit the Strait daily. The closure has driven Brent crude above $100 per barrel, doubled European gas prices, and generated cascading effects on food prices, fertiliser supplies, and industrial output worldwide. [M1]

This assessment examines how a coalition of NATO members and Arab Gulf states could restore safe passage through the Strait, even under the assumption that Iran refuses to surrender after its drone and missile stocks are substantially depleted. It integrates military analysis with diplomatic options, legal frameworks, alternative energy routes, and regional perspectives drawn from Arabic, Hebrew, Turkish, and Farsi sources alongside Western reporting.

The Threat. Iran's anti-access strategy relies on five overlapping layers: anti-ship missiles (including ballistic variants with manoeuvring warheads), approximately 3,000 swarm craft, one-way attack drones, a stockpile of 5,000–6,000 naval mines, and midget submarines. Three fortified islands – Abu Musa, Greater Tunb, and Lesser Tunb – command the shipping lanes. Iran is not enforcing a total closure but a discriminatory-access regime, permitting passage to vessels from "non-hostile" states while denying it to those associated with the United States and Israel. [M44] [M60] [M61] [M62]

The Coalition. The practical coalition for Hormuz operations consists of the United States and France, with limited British air support (four Typhoons and one destroyer), a 22-state broader coalition of varying commitment, and Gulf states providing basing, air defence, and surface combatants. Italy has withdrawn. The United Kingdom's deployable naval strength is at its lowest in history. Saudi and UAE forces are stretched across Yemen, Sudan, and homeland defence against sustained Iranian drone and missile attacks. [M74] [M75] [M76] [M57]

The Campaign. Reopening the Strait requires a phased, multi-domain operation: suppression of coastal and island-based anti-ship systems; seizure of the three contested islands; mine countermeasures; convoy escort operations; and persistent counter-drone and counter-swarm patrols. A prerequisite – not yet addressed – is neutralising the Houthi threat to Red Sea bypass routes, without which even the primary alternative (the Saudi East-West pipeline to Yanbu) remains at risk.

The Depletion Crisis. The central operational problem is not Iranian strength but coalition sustainability. Defending against Iranian drones and missiles is consuming interceptors at an unsustainable rate: a single Patriot interceptor costs $4–6 million to destroy a $35,000 Shahed drone. The UAE used 803 Patriot missiles on the first day alone. Global Patriot production is approximately 60–65 missiles per month. The cost-exchange ratio of 114:1 in Iran's favour means the coalition is losing the war of attrition even while winning every engagement. [M102]

The Ukrainian Solution. Ukrainian drone technology – battle-tested against 57,000+ Shahed attacks – is the most cost-effective force multiplier available. A package of 100–150 Magura naval drones, 3,000–5,000 interceptor drones, expanded advisory teams,

and electronic warfare systems would cost $85–165 million – less than the price of two SM-6 interceptor missiles at current production rates. Some 228 Ukrainian specialists are already advising Gulf states. The principal obstacle to scaling this up is political: the Trump administration's reluctance to be seen as dependent on Ukraine. [M6] [M13]

Alternative Routes. Existing bypass infrastructure (primarily the Saudi Petroline to Yanbu and the UAE Habshan–Fujairah pipeline) can handle approximately 6.5 million b/d – roughly one-third of normal Hormuz flows. Qatar's 80 million tonnes per year of LNG has no bypass option whatsoever. Under a "Watchful Peace" scenario lasting a decade or more, a crash programme of pipeline duplication costing $29–46 billion could close the crude oil gap within 5–7 years. Canal routes are impractical. [R1] [R4] [R6]

Diplomacy. The Trump administration has transmitted a 15-point ceasefire plan to Iran via Pakistan, demanding nuclear dismantlement, proxy disarmament, and Strait reopening in exchange for sanctions relief. Iran has rejected it and issued counter-demands including Gulf base closures, reparations, and a Hormuz transit fee modelled on the Suez Canal. Selective reopening of the Strait to "non-hostile" vessels may represent the beginning of a face-saving de-escalation – or a trap. The island sovereignty dispute (Abu Musa, Greater and Lesser Tunb) is the most productive diplomatic lever: international models such as the Åland Islands and Svalbard offer frameworks for demilitarisation, shared access, and deferred sovereignty. [D11] [D16] [L17] [L18]

Legal Framework. Iran's closure of the Strait is illegal under both UNCLOS transit passage provisions and customary international law. Coalition escort operations have a firm legal basis. Environmental escalation – attacks on oil refineries, tankers, or offshore platforms – would generate catastrophic pollution and legal liability, but enforcement mechanisms are weak. [L1] [L3]

Recommendations. The ten highest-priority actions are:

Priority	*Action*	*Timeline*
1	Close the Strait to Iranian oil exports	Immediate (political decision)
2	Shift to cheap anti-drone defence (guns, rockets, interceptor drones)	Immediate
3	Procure Ukrainian USVs and interceptor drones at industrial scale	Days 1–30
4	Deploy mine countermeasures assets to the Gulf	Immediate
5	Neutralise the Houthi threat to Red Sea bypass routes	Weeks 1–4
6	Suppress island and coastal air defences	Days 1–7

Priority	*Action*	*Timeline*
7	Seize Abu Musa, Greater Tunb, and Lesser Tunb	Days 7–14
8	Begin convoy escort operations	Days 14–21
9	Emergency expansion of Yanbu port loading capacity	Weeks 1–8
10	Engage China diplomatically on Strait reopening	Immediate

Key Uncertainties (as of 25 March 2026, 18:00 UTC). The following developments, any of which could occur within days, would materially alter this assessment:

- **Mines:** Iran has not yet deployed its stockpile of 5,000–6,000 naval mines. Deployment would extend the reopening timeline from weeks to months and dramatically increase the MCM force requirement. [M58]
- **Islamabad talks:** Pakistan is arranging face-to-face US–Iran talks, possibly as early as 28 March. A ceasefire framework would change the entire calculus. [D14]
- **Iranian oil blockade:** The United States has not yet closed the Strait to Iranian oil exports. Doing so would be the single most impactful tactical change but carries escalation risk.
- **Selective reopening:** Iran's offer to permit "non-hostile" vessels through the Strait could evolve into a genuine de-escalation or could collapse if the United States escalates. [D16]
- **Interceptor resupply:** The rate at which Patriot and SM-6 interceptors can be resupplied – currently approximately 65 per month versus approximately 800 used on Day 1 – determines how long the coalition can sustain current operations.

Part I: The Operational Environment

1.1 Geography of the Strait

The Strait of Hormuz links the Persian Gulf to the Gulf of Oman and the wider Indian Ocean. At its narrowest point, the passage is only 21 miles (34 km) wide, with two unidirectional shipping lanes each approximately two miles across, separated by a two-mile buffer zone. [M2] The Iranian coastline, mountainous and deeply indented with coves and inlets, runs along the northern side of the Strait, while Oman's Musandam Peninsula forms the southern shore. The proximity of Iranian territory to the shipping lanes – in some places less than 15 nautical miles – drastically reduces warning times for any defensive system.

The Persian Gulf itself is a "dead end" stretching approximately 500 miles from the Strait to its northern extremity near Basra. There are no alternative sea routes for

shipping. [M3] The Gulf's waters are shallow, with strong currents and seabed conditions that complicate sonar detection, making mine countermeasures operations particularly difficult. Saudi Arabia can divert some crude via the East-West pipeline to the Red Sea, and the UAE through the Habshan–Fujairah pipeline, but together these bypass only several million barrels per day – far short of the volumes normally transiting the Strait. [M3]

1.2 The Iranian Island Chain

Three island groups dominate the approaches to the Strait and form the backbone of Iran's anti-access strategy. The following table summarises their strategic significance:

Island	*Area*	*Distance from UAE*	*Strategic Significance*
Abu Musa	~12 km²	~60 km	Largest garrison; ~300 km from Al Udeid Air Base (Qatar); multi-layered air defence and anti-ship missile batteries
Greater Tunb	~26 km²	~70 km	Advanced missile systems deployed since late 2024; commands northern approach to Strait
Lesser Tunb	~2 km²	~75 km	Smaller garrison; supports Greater Tunb operations
Qeshm Island	~1,491 km²	N/A (Iranian)	Largest island in Gulf; IRGC drone base; underground naval cove (entrance damaged)
Larak Island	~49 km²	N/A (Iranian)	South of Hormuz Island; Silkworm and Sea Hawk-2 anti-ship missiles since 1987
Hormuz Island	~42 km²	N/A (Iranian)	At the mouth of the Strait; strategic observation position

The IRGC deployed advanced air defence and anti-ship missile systems to Abu Musa, Greater Tunb, and Lesser Tunb beginning in late 2024. The IRGC Navy Commander stated these systems enable targeting within a 600-kilometre radius, covering the

eastern Persian Gulf and threatening Al Dhafra Air Base (Abu Dhabi), Al Udeid Air Base (Qatar), and Naval Support Activity Bahrain. [M4] The islands collectively command the shipping lanes and, if left in Iranian hands, would make any convoy operation prohibitively dangerous.

Part II: Iranian Military Capabilities

Iran does not require a conventional fleet blockade to disrupt traffic through Hormuz. Instead, its strategy relies on exploiting geography and asymmetric tactics to offset Western military superiority. [M3] The Iranian threat can be understood as five overlapping layers.

2.1 Anti-Ship Missiles

Iran fields the Noor and Qader families (derived from the Chinese C-802), sea-skimming cruise missiles with 200–300 km range and approximately 200 kg warheads, deployable from mobile coastal launchers, surface vessels, and aircraft. Longer-range systems include the Ghadr-380 class (~1,000 km range) and the Khalij Fars anti-ship ballistic missile (~300 km range) with a manoeuvring re-entry vehicle and electro-optical seeker. The Hormuz-2 variant adds radar-homing and anti-radiation capability. [M5] Mobile launchers, often disguised as civilian trucks, are positioned along the mountainous coastline and can relocate rapidly after firing.

Arabic military analysts assess Iranian targeting as more sophisticated than much Western reporting suggests. Al Jazeera Arabic reported that “Iranian missiles targeted high-value symbolic sites such as the Dimona reactor” using “advanced guidance systems and radar signature” tracking, and that the targeting followed a deliberate “target-for-target” doctrine rather than indiscriminate fire. [M44] [M45] This assessment, if accurate, implies that the degradation of Iranian missile capability reported by CENTCOM may overstate the reduction in effective threat.

2.2 Swarm Craft

Iran is believed to possess around 3,000 Boghammar-type small craft capable of swarm attacks, including fast attack craft armed with short-range anti-ship missiles or torpedoes, heavy machine guns, and rocket launchers, supplemented with semi-submersible boats designed for covert explosive strikes. [M3] These forces are operated primarily by the IRGC Navy (Nedsa), which has developed a doctrine prioritising numbers, mobility, and dispersion over large warships.

2.3 Drones and Unmanned Systems

The IRGC maintains substantial stocks of one-way attack UAVs (including Shahed variants) and unmanned surface vehicles. Even after US Central Command reported that Iranian ballistic missile launches had fallen by approximately 90 per cent and drone attacks by around 83 per cent since the start of Operation Epic Fury, [M3] the residual drone capability remains sufficient to threaten commercial shipping. A Shahed drone struck the US Navy’s nerve centre in Bahrain during daylight hours in the early stages of the conflict. [M6]

2.4 Naval Mines

Iran is believed to possess a stockpile of roughly 5,000 to 6,000 mines, ranging from simple contact devices to sophisticated influence mines triggered by magnetic or acoustic signatures. [M3] [M5] These can be sown rapidly by small boats, disguised civilian vessels, or submarines. Once a single mine is discovered, the entire waterway effectively becomes a hazardous zone until systematic clearance operations are completed. As of 11 March, fewer than ten mines had been laid – suggesting Iran is holding this capability in reserve. [M58] Critically, Iran also depends on Hormuz for its own exports, particularly oil and fertiliser products. [M3]

2.5 Submarines

Iran operates three Russian-built Kilo-class submarines (Tareq class) with 533 mm torpedo tubes and mine-laying capability, along with Ghadir and Nahang-class midget submarines optimised for short-range surprise attacks, mine insertion, and special operations. [M5] While the Kilo-class boats are constrained by the Gulf's shallow waters, the midget submarines are well-suited to the littoral environment.

2.6 Air Defences

Iranian air defence systems on the islands and coastline include the S-300PMU2 (Russian-supplied), the indigenous Bavar-373 with Sayyad-4B interceptors (~300 km range), and shorter-range systems including the Khordad-15 (120 km) and 3rd Khordad (105 km). [M4] [M5] These threaten ISR platforms, non-stealth aircraft, and helicopters operating over the Strait.

2.7 The Selective-Passage Regime

A critical finding from non-English sources is that Iran is not enforcing a total closure of the Strait. Multiple sources in Hebrew, Turkish, Arabic, and Egyptian press confirm that Iran is allowing vessels from non-belligerent states to transit Hormuz under coordination with Tehran. [M55] [M60] [M61] [M62] Indian LPG carriers have made at least four transits. [M66] Japan is negotiating passage rights. [M55] Iran's Defence Council stated that "the only way for vessels of non-belligerent states to cross Hormuz is prior coordination with Tehran." [M61] Iran's Foreign Minister Abbas Araghchi denied closing the Strait entirely, stating that "Hormuz has not been closed; shipping continues, but there is growing hesitation to cross under present tensions." [M62]

This discriminatory-access regime is fundamentally different from the "total closure" framing in much Western reporting. It is unlawful under UNCLOS – transit passage cannot be suspended or discriminated against – but it is operationally significant and creates a de facto two-tier system.

Part III: Coalition Forces – Declared vs Deployable

3.1 Current Naval Deployments

The following table summarises the principal naval forces currently deployed or deploying to the region as of 25 March 2026:

Nation	*Key Assets*	*Notes*
United States	2 carrier strike groups (USS Abraham Lincoln on station; USS Gerald R. Ford in Red Sea); ~8 Arleigh Burke-class destroyers (CENTCOM); ~7 destroyers (Mediterranean); LCS with MCM modules (outside Gulf)	Perhaps 10 destroyers available for convoy duties after carrier escort deductions [M3]
France	FS Charles de Gaulle (R91) carrier strike group; 8 frigates total pledged; 2 amphibious assault ships; nuclear-powered attack submarine; fleet oiler	2 frigates dedicated to Hormuz escort; Macron described mission as "purely defensive" [M7]
United Kingdom	HMS Dragon (D35) Type 45 destroyer; 3 Wildcat helicopters; 1 Merlin Crowsnest AEW helicopter; HMS Bangor (Sandown-class minesweeper); RFA Stirling Castle	Working with Germany and Italy on commercial shipping support [M1]
Australia	E-7A Wedgetail AEW aircraft deployed to UAE	Airborne early warning contribution

A broader coalition of 22 states has been announced, [M57] but the gap between declared commitment and actual deployable strength is significant for every country examined.

3.2 The United Kingdom – "Where is the Royal Navy?"

The United Kingdom's deployable naval strength for Gulf operations is at its lowest in history. Le Figaro reported that "the Royal Navy now has the lowest number of ships and personnel in its history." [M75]

Asset	*Status*	*Source*
HMS Duncan (Type 45)	Recently completed FOST; only immediately deployable destroyer	[M74]
HMS Dauntless (Type 45)	In three-month Fleet Time Support period	[M74]
HMS Dragon (Type 45)	In dry dock; earmarked for NATO duties; delayed deployment criticised	[M78]
HMS Defender (Type 45)	Major refit	[M74]
HMS Diamond (Type 45)	Major refit	[M74]

Asset	*Status*	*Source*
HMS Daring (Type 45)	Regenerating; may rejoin fleet later 2026	[M74]
HMS Middleton (MCM)	Last RN vessel in Gulf – returning home on heavy lift vessel	[M74]
Carrier Strike Group	Committed to North Atlantic (Operation Firecrest) – not available for Gulf	[M74] [M93]
Typhoon FGR4 (4 aircraft)	Deployed to Qatar – only significant UK contribution	[M80]
British commandos	"Hitching rides on allied vessels" – no dedicated transport	[M74]

The UK has effectively one destroyer available for Gulf operations. The 2026 Carrier Strike Group is committed to Operation Firecrest in the North Atlantic, reinforcing NATO deterrence against Russia – a competing commitment that underlines the scarcity of genuinely free British maritime capacity. Navy Lookout's headline – "Middle East in Flames – Where is the Royal Navy?" – captures the situation. [M74] Mine countermeasures capability is particularly thin: autonomous MCM systems exist but in small numbers and with significant readiness constraints. [M94]

3.3 France – The Principal European Contributor

France is the most significant European contributor by far. The deployment of approximately half the fleet is historically unprecedented outside wartime.

Asset	*Status*	*Source*
Charles de Gaulle CSG	Deployed to Eastern Mediterranean	[M76] [M85]
8 warships (frigates, destroyers)	Deployed with CSG	[M76]
2 Mistral-class LHDs	Available for amphibious operations	[M76]
Nuclear submarine	Deployed to region	[M76]
10 additional warships pledged	For Hormuz escort duties specifically	[M76]
Abu Dhabi naval base	"Capable of hosting all vessels of the Marine nationale, including the aircraft carrier"	[M85]

The French Senate's defence budget committee identified readiness as a central management challenge: the Marine nationale is conducting "MCO continu" (continuous maintenance) to optimise availability, but this remains a problem even inside a rising

defence budget. [M95] Ouest-France drew parallels to Operation Prométhée (1987–88), noting that even 415 days of French Gulf deployment in the 1980s was a severe strain. [M86]

3.4 Italy – Political Withdrawal

Italy's position shifted dramatically within ten days. Defence Minister Crosetto initially offered "air defence systems, anti-drone and antimissile systems" on 5 March. [M91] By 13 March, reports emerged of secret France-Italy negotiations with Iran for ship passage through Hormuz. [M88] By 15 March, Italy "refused to join the Iran war and began withdrawing troops from Iraq." [M91] The Italian Navy was actively building readiness before the war began – the "Mare Aperto 2026" exercise was designed to strengthen operational readiness [M96] – so the decision to withdraw was political, not a reflection of incapacity.

3.5 Countries Refusing Deployment

The following countries have explicitly declined to send naval vessels for Hormuz escort operations: [M81]

Country	*Reason*
Germany	Political opposition to involvement in US-led war
Spain	Same
Italy	Withdrew from coalition entirely
Japan	Constitutional constraints; energy dependency on Gulf
Australia	Distance and Indo-Pacific focus
Greece	Aegean/Turkey focus; networking only [M98]

3.6 Arab Gulf State Forces

Saudi Arabia operates a substantial military: 227 combat aircraft, 7 frigates, 4 corvettes, and Patriot and THAAD air defence systems. However, Saudi forces are constrained by ongoing Yemen operations, political desire not to be seen as a co-belligerent, and air defence systems already stretched intercepting daily Iranian attacks. [M80] Arabic-language sources reveal a more nuanced picture: the Riyah Al Salam 2026 joint exercise with Oman involved 10 warships and was explicitly designed to raise readiness, [M99] and the Tuwaiq-class modernisation programme shows a long-term investment pipeline. [M100] Hebrew-language i24news reported that Iranian officials believe "the Saudis are on the edge" and that continued large-scale attacks could push Saudi Arabia into direct offensive action against Iran. [M49]

The UAE is the most directly affected Gulf state, absorbing the highest volume of Iranian fire. Al Khaleej Arabic-language figures provide the most detailed cumulative tally: 352 ballistic missiles, 15 cruise missiles, and 1,789 drones since the start of hostilities – a total of over 2,150 projectiles. [M102] Its air defence systems are under severe strain. Military forces are also committed in Yemen and Sudan. The $8.4 billion arms deal announced during the war signals long-term US commitment but does not address immediate deployable strength. [M80]

3.7 The Coalition Gap

Country	*Declared for Hormuz*	*Actually Deployable*	*Gap*
USA	Massive naval presence	Constrained by interceptor depletion and MCM gap	Moderate
France	~20 warships including carrier	Genuinely deployed; main European contributor	Small
UK	"Standing with allies"	1 destroyer, 4 Typhoons, commandos without ships	**Enormous**
Italy	Initially offered AD systems	Withdrew entirely (political, not incapacity)	**Total**
Saudi Arabia	Largest Gulf military	Stretched across Yemen + homeland defence	**Large**
UAE	Substantial military	Stretched across Yemen, Sudan + absorbing 2,150+ projectiles	**Large**

The practical coalition for Hormuz operations consists of the United States and France, with limited UK air support and Gulf states providing basing and air defence. Every other potential contributor has either declined or is too stretched to contribute meaningfully. [M74] [M76]

Part IV: The Five-Phase Campaign

Restoring safe passage through the Strait of Hormuz requires a phased campaign that addresses each layer of the Iranian anti-access system. The assumption is that Iran's drone and missile stocks are substantially depleted but that the regime refuses to surrender, retaining residual capabilities in swarm craft, mines, submarines, coastal artillery, and reconstituted drone operations.

Phase 0: The Houthi Prerequisite

Before the Strait can be reopened, the Houthi threat to Red Sea bypass routes must be neutralised. A Reuters investigation published on 25 March documented the scale of the failure: the Western coalition's effort to secure Red Sea shipping "cost billions of dollars and ultimately failed against Yemen's Houthis" – with four ships sunk, more than $1 billion in weapons expended, and a route the shipping industry still largely avoids.

[R17] Iran, the article noted, is "a more formidable adversary than the Houthis." If the coalition cannot secure the Red Sea against the Houthis, the credibility of securing Hormuz against Iran is fundamentally undermined.

Phase 1: Suppression of Coastal and Island-Based Defences (Days 1–14)

Objective: Neutralise or degrade Iranian anti-ship missile batteries, air defence systems, radar installations, and command-and-control nodes along the 250-mile coastal strip from Abu Musa to Jask and on the contested islands.

Air power is the primary instrument for this phase. The two US carrier air wings (each comprising approximately 44 F/A-18E/F Super Hornets and 5 EA-18G Growlers) provide the core strike and electronic warfare capability. The French Charles de Gaulle air wing adds Rafale M fighters with SCALP cruise missiles and AASM precision-guided munitions.

The key challenge is mobile missile launchers concealed in mountainous terrain. Even extensive surveillance cannot guarantee every launcher will be detected before it fires. [M3] The solution is a combination of persistent ISR and rapid-response strike:

Persistent ISR architecture. MQ-9 Reaper and MQ-4C Triton UAVs provide continuous wide-area surveillance. The Australian E-7A Wedgetail and US E-2D Advanced Hawkeye aircraft provide airborne early warning. P-8A Poseidon maritime patrol aircraft conduct anti-submarine warfare and surface search.

Electronic warfare. EA-18G Growlers suppress Iranian radar and communications. GPS jamming by Iran, already reported extensively around the Strait, [M11] must be countered by coalition electronic warfare assets and by ensuring that precision-guided munitions use alternative guidance (INS/imaging infrared) rather than relying solely on GPS.

Strike against fixed installations. Tomahawk cruise missiles from Arleigh Burke-class destroyers and submarine-launched variants can strike hardened targets including the underground naval facility at Qeshm and fixed missile batteries on the islands. Air-launched standoff weapons (JASSM, SCALP, Storm Shadow) reduce aircrew exposure to air defences.

Phase 2: Seizure of the Three Contested Islands (Days 7–21)

Objective: Seize Abu Musa, Greater Tunb, and Lesser Tunb to eliminate the island-based threat to shipping lanes and establish forward operating bases for sustained operations.

This is the most operationally demanding phase and requires amphibious and air assault forces. The islands are small (collectively under 40 km^2) but fortified, and Iranian garrisons are expected to resist. [M4]

Element	*Platform*	*Role*
Amphibious assault ships	French Mistral-class (2 available); potentially US LHD/LPD	Helicopter and landing craft operations

Element	*Platform*	*Role*
Marine infantry	US Marines (MEU if available); French naval infantry; UAE and Saudi special forces	Ground assault and clearance
Attack helicopters	AH-1Z Viper (USMC); Tigre (French); AH-64 Apache (UAE, Saudi)	Close air support, anti-armour
Naval gunfire	Arleigh Burke-class destroyers (5-inch guns); frigates	Shore bombardment
Special operations	US Navy SEALs; French commandos marine; UAE SOF	Advance reconnaissance, direct action

The two French amphibious assault ships (Mistral-class, each capable of carrying 16 helicopters, 450 troops, and landing craft) are critical enablers. Arab Gulf state forces – particularly UAE and Saudi special operations units – should participate both for operational capability and political legitimacy, given the UAE's longstanding territorial claims to Abu Musa and the Tunbs.

Lesser Tunb, the smallest island at approximately 2 km^2, would be seized first as a proof of concept and to establish a fire support base. Greater Tunb and Abu Musa would follow in rapid succession. Once seized, the islands become invaluable forward operating bases: radar stations, short-range air defence systems, helicopter operating bases, and small-craft patrol stations directly overlooking the transit corridor.

Phase 3: Mine Countermeasures (Days 1–Ongoing)

Objective: Ensure shipping lanes are clear of mines and maintain swept channels.

This is the most challenging and time-consuming element of the campaign. The US Navy decommissioned its Avenger-class mine countermeasures ships and removed them from Bahrain in January 2026, just weeks before the crisis erupted. [M3] The Royal Navy has only HMS Bangor (a single Sandown-class minesweeper) and RFA Stirling Castle available. [M3]

Capability	*Available Platforms*	*Gap*
Dedicated minesweepers	HMS Bangor (UK); Saudi Al Jawf-class; limited allied MCM	Severely insufficient for dense minefield
MCM modules on LCS	US Independence/Freedom-class LCS (outside Gulf)	Need to be brought into theatre
Autonomous underwater vehicles	UK autonomous minehunting systems (nascent)	Not yet mature at scale

Capability	*Available Platforms*	*Gap*
MCM helicopters	MH-53E Sea Dragon (if available)	Limited numbers
Expeditionary Sea Bases	USS Lewis B. Puller-class ESBs	Excellent platforms for MCM helicopter and UUV operations

As of 11 March, fewer than ten mines had been laid, [M58] suggesting Iran is holding this capability in reserve – a strategic calculation that it also depends on Hormuz for its own exports. If Iran does deploy its full mine stockpile, clearing operations could take weeks or months and could probably only be completed after a ceasefire. [M3] The coalition must therefore prioritise preventing mine-laying through persistent surveillance of Iranian ports, submarine tracking, and interception of mine-laying vessels.

Phase 4: Convoy Escort Operations (Days 14–Ongoing)

Objective: Escort commercial shipping through the Strait and the length of the Gulf under a layered defence umbrella.

Convoy operations should be modelled on, but significantly updated from, Operation Earnest Will. The 1980s operation escorted reflagged Kuwaiti tankers with three to four warships per convoy. [M12] The 2026 threat environment demands a more comprehensive approach. A standard convoy of 10–15 tankers would require the following escort:

Layer	*Assets*	*Role*
Outer air screen	E-2D Hawkeye or E-7A Wedgetail; CAP of 2–4 fighters	Early warning; air superiority; anti-drone
Overhead ISR	MQ-9 Reaper; MQ-4C Triton	Persistent surveillance of Iranian coast
Forward surface screen	1–2 Arleigh Burke-class destroyers or FREMM frigates	Area air defence (SM-2/SM-6); anti-ship missile defence
Close escort	2–3 frigates/corvettes (Type 45, Baynunah, Al Jubail)	Point defence; CIWS; anti-swarm
Anti-submarine	1 frigate with towed array; MH-60R helicopters	ASW screen
MCM advance	MCM vessel or autonomous systems ahead of convoy	Route clearance
Counter-swarm	Armed helicopters (Wildcat, Seahawk); USVs	Anti-fast attack craft
Counter-drone	Ukrainian interceptor drone systems on escort vessels	Low-cost Shahed/drone interception

Sustaining convoy operations requires a minimum of 20–25 escort-capable warships rotating through the theatre, assuming each convoy requires five to seven escorts and transit time through the Gulf is three to five days each way. The current coalition can muster approximately 15–18 suitable warships, meaning additional contributions from NATO and GCC navies are essential. [M3]

Phase 5: Coastal Denial and Sustained Suppression (Ongoing)

Objective: Prevent Iranian reconstitution of anti-ship capabilities and maintain a security zone along the Iranian coast.

Even after the initial suppression campaign, Iran retains the ability to reconstitute threats from its deeply indented coastline. Mobile missile launchers can be moved from storage to firing positions in minutes. The IRGC's "mosaic" decentralised command structure is designed to keep local commands lethal even under electronic attack and with degraded communications. [M5]

Sustained suppression requires persistent armed overwatch using a combination of manned aircraft on combat air patrol and armed UAVs maintaining continuous coverage of the coastal strip; a maritime exclusion zone enforced around the Iranian coast to a depth of 20–30 nautical miles; an electronic warfare blanket maintained over the Strait; and forward-based forces on seized islands providing rapid-response capability.

Part V: The Ukrainian Drone Contribution

Ukrainian drone technology, battle-tested over three years of high-intensity warfare against Russia, represents the single most relevant and immediately available force multiplier for Hormuz operations. The contribution falls into three categories: naval surface drones, counter-drone interceptors, and operational expertise.

5.1 Naval Surface Drones for Patrol and Attack

Ukraine's Magura V5 unmanned surface vehicle has demonstrated extraordinary combat effectiveness, sinking eight Russian warships and damaging six more, inflicting over $500 million in damage to the Russian Black Sea Fleet. [M13] Its characteristics make it well-suited to Gulf operations:

Specification	*Magura V5*	*Magura V7*
Displacement	1.1 tonnes (full)	1.3–3.7 tonnes
Length	5.5 m	7.3 m
Range	400+ nm	~800 nm
Speed	22 kts cruise / 42 kts max / 54 kts burst	Similar or improved
Payload	320 kg	635 kg
Guidance	GPS, INS, FPV camera, mesh radio, satellite	Enhanced autonomous
Cost	$250,000–$300,000	Higher

Specification	*Magura V5*	*Magura V7*
Production rate	Up to 50 per month	Scaling up

The Magura V5's low profile (waterline height of only 1.6 feet) and low thermal signature make it difficult to detect, while its carbon-fibre V-shaped hull and waterjet propulsion provide excellent speed and manoeuvrability. [M13] In the Gulf context, these drones could perform several critical roles: anti-swarm screening deployed in packs ahead of convoys; persistent surveillance of the approaches to Iranian ports; anti-submarine picket duty in shallow water; mine detection with side-scan sonar; and offensive strike against Iranian naval assets.

The larger Magura V7, with its 800-nautical-mile range and 635 kg payload capacity, adds further capability. Armed with AIM-9 Sidewinder missiles, V7 drones shot down two Russian Su-30 strike fighters in May 2025, [M13] demonstrating an air-defence capability that could protect convoys against low-flying Iranian drones or helicopters.

The Sea Baby USV variant adds the ability to launch 122 mm rockets for coastal suppression and, critically, to deploy fibre-optic-guided FPV drones from the sea surface. [M14] These fibre-optic drones are unjammable – a significant advantage given the extensive GPS jamming and electronic warfare environment around the Strait. [M11]

Recommended procurement: A fleet of 100–150 Magura V5s and 20–30 Magura V7s, at a total cost of approximately $30–50 million, would provide a transformative capability for Gulf operations. This is less than the cost of a single Arleigh Burke-class destroyer's annual operating budget.

5.2 Counter-Drone Interceptors

The second critical Ukrainian contribution addresses the most immediate gap in Gulf defences: the inability to cost-effectively intercept Iranian Shahed-type one-way attack drones. Video footage from the current conflict shows Shaheds routinely breaking through Gulf defences – something that is relatively rare in Ukraine despite the far larger scale of Russian attacks. In Ukraine, less than 10 per cent of Shaheds hit their targets, and domestically produced interceptor drones now account for nearly one-third of Russian aerial threats successfully neutralised. [M6]

System	*Developer*	*Speed*	*Cost*	*Key Feature*
General Cherry Bullet	General Cherry (volunteer startup)	~300 km/h	~$1,000–$2,000	FPV-guided kinetic interceptor with explosive payload; over 1,000 kills
Sting	Wild Hornets	Several hundred km/h	~$1,000–$2,000	FPV loitering munition/interceptor; overtakes Shaheds; over 1,000 kills

System	*Developer*	*Speed*	*Cost*	*Key Feature*
Octopus	Ukrainian-UK cooperation	High	Higher	Image recognition terminal guidance; works in jammed environments
Merops	Schmidt Futures (US)	Autonomous	Moderate	AI-guided; operates when GPS jammed; fits in pickup truck

These systems are dramatically cheaper than the missiles currently used to intercept drones. A single SM-2 missile costs approximately $2.1 million; a RAM costs approximately $1 million; even a Stinger costs around $120,000. [M6] Using a $1,000–$2,000 interceptor drone to destroy a $20,000–$50,000 Shahed represents a sustainable exchange ratio, whereas firing million-dollar missiles at cheap drones rapidly depletes expensive defensive stocks.

Recommended procurement: Thousands of interceptor drones (Sting, General Cherry Bullet, and Octopus variants) at a total cost of $5–20 million would provide a counter-drone umbrella across the entire theatre.

5.3 Operational Expertise and the Brave1 Ecosystem

Beyond hardware, Ukraine offers three years of intensive operational experience in drone warfare at a scale and intensity unprecedented in military history. Ukraine's Brave1 technology cluster, the government's official defence technology agency, facilitates rapid innovation by connecting developers, the military, investors, and government. [M6] Ukraine embraces a "good enough" philosophy, rapidly fielding inexpensive effective systems rather than pursuing exquisite but slow-to-deploy solutions.

Ukrainian operators, advisers, and trainers could be embedded with coalition forces to transfer knowledge on drone tactics, electronic warfare countermeasures, and the integration of unmanned systems into conventional naval operations. The startup Uforce is already building Ukrainian drone boats for Western militaries, [M15] and President Zelenskyy has offered naval drone technology to Japan in exchange for air defence systems, [M16] demonstrating Ukraine's willingness to export these capabilities. Some 228 Ukrainian specialists are already advising Gulf states.

5.4 Total Unmanned Systems Cost

System	*Quantity*	*Role*	*Approximate Cost*
Magura V5 USV	100–150	Anti-swarm, surveillance, mine detection, attack	$25–45 million

System	*Quantity*	*Role*	*Approximate Cost*
Magura V7 USV	20–30	Extended patrol, air defence, strike	$10–20 million
Sea Baby USV	20–30	Coastal strike, FPV drone carrier	$5–10 million
Interceptor drones (Sting/Cherry/Octopus)	3,000–5,000	Counter-drone defence	$5–20 million
Merops counter-drone systems	20–30 units	Autonomous drone interception	$10–20 million
Total			**$55–115 million**

The total cost is less than the price of a single frigate and represents extraordinary value relative to the threats addressed.

Part VI: Optimal Force Mix

6.1 Air Power

Aircraft Type	*Quantity Needed*	*Primary Role*	*Source*
F/A-18E/F Super Hornet	80–90 (2 carrier air wings)	Strike, air superiority, SEAD	US Navy
EA-18G Growler	10–12	Electronic warfare, SEAD	US Navy
Rafale M	20–24	Strike, air superiority	French Navy
MQ-9 Reaper	12–16	Armed ISR, persistent surveillance	US, UK, France
MQ-4C Triton	2–4	Wide-area maritime surveillance	US Navy
E-2D Hawkeye	4–6	Airborne early warning	US Navy
E-7A Wedgetail	1–2	Airborne early warning	Australia
P-8A Poseidon	6–8	Maritime patrol, ASW	US, UK

Air power is essential for the suppression phase but cannot alone control the maritime environment. The “air superiority paradox” identified by Navy Lookout applies: even with localised air superiority, mobile missile launchers remain hidden and small boats can disperse across numerous coastal inlets. [M3]

6.2 Helicopter Power

Helicopters are the most versatile and responsive asset for the confined waters of the Gulf:

Type	*Role*	*Key Weapons*	*Source*
AH-1Z Viper	Anti-swarm, close air support	Hellfire, 20 mm cannon	USMC
AH-64 Apache	Anti-swarm, anti-armour	Hellfire, 30 mm cannon	UAE, Saudi Arabia
Tigre	Close air support	HOT missiles, 30 mm cannon	France
Wildcat HMA.2	Anti-surface, anti-submarine	Sea Venom, Martlet, torpedoes	UK
MH-60R Seahawk	ASW, anti-surface	Hellfire, torpedoes, sonobuoys	US, Saudi Arabia
MH-53E Sea Dragon	Mine countermeasures	Mine-sweeping gear	US Navy
Merlin HM.2	ASW, AEW (Crowsnest)	Torpedoes, Sting Ray	UK

Armed helicopters are the single most effective counter to Iranian swarm craft. During the 1980s Tanker War, US Army helicopters caught the Iranian vessel Iran Ajr actively placing mines and engaged it, leading to its capture. [M12] A minimum of 30–40 armed and utility helicopters should be available across the theatre.

6.3 Naval Surface Forces

Ship Type	*Minimum Needed*	*Primary Role*	*Sources*
Aircraft carriers	2–3	Air power projection, command	US (2), France (1)
Arleigh Burke-class destroyers	8–10	Area air defence, strike, escort	US Navy
Type 45 destroyer	1–2	Area air defence	Royal Navy
FREMM/Horizon frigates	4–6	Multi-role escort, ASW	France, Italy
Al Jubail-class corvettes	4–5	Escort, patrol, anti-surface	Saudi Arabia
Baynunah-class corvettes	4–6	Escort, patrol, anti-surface	UAE
Littoral Combat Ships	3–4	MCM modules, patrol	US Navy
Expeditionary Sea Bases	2	MCM mothership, SOF, helicopter ops	US Navy

Ship Type	*Minimum Needed*	*Primary Role*	*Sources*
Amphibious assault ships	2–3	Island seizure, helicopter ops	France (Mistral), US
MCM vessels	4–6	Mine clearance	UK, Saudi, allied
Submarines (SSN)	2–3	ISR, strike, deterrence	US, France, UK

The total requirement of approximately 35–45 warships exceeds what is currently available in theatre but is achievable through surge deployments from NATO and GCC navies.

Part VII: Lessons from the 1980s Tanker War

The 1980s Tanker War offers four enduring lessons that must inform the 2026 campaign, as identified by USNI Naval History: [M12]

First, convoy operations rarely address mine warfare effectively. During Operation Earnest Will, no minesweepers were deployed in advance of the first convoy despite intelligence warnings. The tanker Bridgeton hit a mine on the very first transit, and the escort warships were forced to follow behind the damaged tanker because they were more vulnerable to mines than the double-hulled supertanker. In 2026, the coalition must deploy MCM assets before the first convoy sails, not after the first mine strike.

Second, offensive search-and-seizure operations disrupt mine-laying. The capture of the Iran Ajr while actively laying mines was a turning point in the 1980s campaign. In 2026, persistent surveillance of Iranian ports and interception of any vessel suspected of mine-laying must be a priority from day one. Ukrainian Magura USVs in surveillance mode can maintain this watch at far lower cost and risk than manned warships.

Third, expeditionary forces are essential mine warfare assets. During the 1980s, the barge Hercules served as a floating base for MCM operations. In 2026, the US Navy's Expeditionary Sea Bases (ESBs) serve the same function at far greater capability. These large, mobile platforms can serve as motherships for MCM helicopters, autonomous underwater vehicles, and special operations forces. Deploying at least two ESBs to the Gulf for MCM operations should be a priority.

Fourth, mine warfare capabilities must be forward and distributed. Centralised MCM forces operating from distant bases cannot respond quickly enough. MCM assets – including autonomous underwater vehicles and mine-hunting USVs – must be distributed across the theatre, operating from ESBs, seized islands, and allied ports.

Beyond these four lessons, the 2026 environment introduces threats that did not exist in the 1980s. The drone and electronic warfare dimensions require entirely new capabilities, and this is precisely where Ukrainian technology and expertise fill the gap.

Part VIII: Clearing the Iranian Coastline

The scenario in which Iran refuses to surrender even when its drone and missile stocks are depleted leaves residual threats: swarm craft (approximately 3,000 Boghammar-type boats), mines (5,000–6,000 in stockpile), midget submarines, coastal artillery, and whatever drone and missile capability Iran can reconstitute from hidden reserves or continued production.

Population and civilian considerations. The Iranian islands of Qeshm (population approximately 150,000), Hormuz Island, and Larak have significant civilian populations. The three contested islands have much smaller populations, with Abu Musa hosting an Iranian garrison and a small Emirati civilian community. Military operations against the contested islands can be conducted with relatively limited civilian impact. Operations against Qeshm, Larak, and the mainland coast must distinguish between military installations and civilian areas, using precision strikes against identified military targets rather than area bombardment.

Destroying coastal military installations along the 250-mile strip from Abu Musa to Jask requires sustained air and missile strikes against identified targets, combined with persistent ISR to detect mobile systems. The mountainous terrain provides extensive concealment, and the IRGC's decentralised "mosaic" command structure means that destroying headquarters does not necessarily disable local units. [M5] The campaign must therefore be attritional, systematically degrading Iranian capability through repeated strikes while maintaining the defensive umbrella over convoys.

Neutralising the swarm craft threat is perhaps the most difficult challenge. Three thousand small boats cannot all be destroyed in port, and they can disperse across hundreds of coastal inlets. The solution is a combination of: strikes against known IRGC naval bases and boat concentrations; a maritime exclusion zone enforced by armed helicopters, USVs, and patrol aircraft; convoy escort with dedicated anti-swarm assets; and acceptance that some attacks will get through, mitigated by point-defence systems on escort vessels.

Part IX: The Interceptor Depletion Crisis

The central operational problem confronting the coalition is not Iranian military strength but the sustainability of coalition defences. The cost-exchange ratio between Iranian offensive systems and coalition defensive interceptors is catastrophically unfavourable, and it is this dynamic – not any single Iranian weapon system – that threatens to determine the outcome of the campaign.

9.1 The Cost-Exchange Problem

The arithmetic is stark. A single Patriot PAC-3 interceptor costs $4–6 million. A single SM-6 missile costs approximately $4.3 million. A single SM-2 costs approximately $2.1 million. Against these, Iran fields Shahed-136 one-way attack drones costing $20,000–$50,000 each. The cost-exchange ratio is approximately 114:1 in Iran's favour when Patriot is used against Shahed. [M6]

The UAE used 803 Patriot missiles on the first day of the conflict alone. [M102] Global Patriot production is approximately 60–65 missiles per month. At the Day 1 expenditure rate, the entire world's monthly production of Patriot missiles would be consumed in less than two hours.

The cumulative UAE interception figures from Al Khaleej Arabic-language reporting provide the most detailed tally available: 352 ballistic missiles, 15 cruise missiles, and 1,789 drones intercepted since 28 February – a total of over 2,150 projectiles. [M102] Each ballistic missile interception typically requires two interceptors (shoot-shoot doctrine), meaning the UAE alone has expended an estimated 700+ interceptors against ballistic missiles, plus hundreds more against cruise missiles and drones.

9.2 The Depletion Timeline

The UAE stopped publishing interception rates after 11 March – almost certainly because the data was revealing the depletion problem. [M102] At the rates observed in the first two weeks, coalition interceptor stocks face exhaustion within weeks, not months. The Omani analysis in Atheer framed the war explicitly as an attrition contest: "The metric of military power now rests less on arsenal size than on managing time and turning the conflict into sustained bleeding of the adversary's financial and psychological nerves." [M64]

9.3 The Solution: Cheap Defence

The only sustainable response is to shift from expensive missile-based interception to cheap alternatives:

Defence Layer	*System*	*Cost per Engagement*	*Effectiveness*
Interceptor drones	Ukrainian Sting, Cherry Bullet, Octopus	$1,000–$2,000	High against Shahed-class drones
Guns and CIWS	Phalanx, Goalkeeper, C-RAM	$100–$500 per burst	Effective at close range
Directed energy	Laser weapons (HELIOS, DragonFire)	~$10 per shot	Emerging; limited availability
Electronic warfare	GPS jamming, spoofing	Negligible per engagement	Effective against GPS-guided drones
Conventional missiles	Patriot, SM-6, SM-2	$2–6 million	Reserved for ballistic missiles only

The shift must be immediate: reserve Patriot and SM-6 for ballistic missile threats only, and use Ukrainian interceptor drones, guns, and electronic warfare against the drone threat. This is not a theoretical recommendation – it is the approach Ukraine has used successfully against 57,000+ Shahed attacks. [M6]

Part X: Two Data Streams – CENTCOM vs Gulf Ministries

A significant analytical challenge is the divergence between two data streams reporting on the same conflict. US Central Command data and Gulf state ministry data tell different stories, and the differences matter for operational planning.

10.1 The CENTCOM Narrative

CENTCOM reports emphasise the degradation of Iranian capability. The headline figures – ballistic missile launches down 90 per cent, drone attacks down 83 per cent – suggest a campaign that is succeeding. [M3] Pentagon briefings by Secretary Hegseth reinforce this narrative with references to destroyed underground facilities and neutralised missile batteries.

10.2 The Gulf Ministry Narrative

Gulf state data tells a different story. The UAE's cumulative interception figures – 2,150+ projectiles as of 23 March – indicate that the volume of fire remains substantial even if reduced from its peak. [M102] Saudi Arabia's air defence systems remain engaged daily. The IEA damage assessment, reported in Turkish-language Euronews, documented "severe damage to more than 40 energy assets in nine countries" [M46] – a figure not widely reported in English.

10.3 Reconciling the Streams

The two narratives are not necessarily contradictory. CENTCOM's "peak-to-current" framing compares current attack rates to the opening days of the war, when Iran launched its heaviest salvos. The reduction is real. But the Gulf ministry data shows that even the reduced rate is sufficient to strain air defences, damage infrastructure, and consume interceptors at an unsustainable pace. The relevant question is not "has the threat decreased?" but "can the coalition sustain defence at the current rate?" The answer, based on interceptor depletion data, is no – not without a fundamental shift in defensive approach.

Arabic military analysts provide a further corrective. Al Jazeera Arabic's assessment that Iranian targeting follows a deliberate "target-for-target" doctrine [M45] suggests that the reduction in volume may reflect a strategic shift to precision rather than a loss of capability. If Iran is firing fewer missiles but hitting higher-value targets more accurately, the CENTCOM degradation narrative may be misleading.

Part XI: Ukrainian Deployment and the Trump–Zelenskyy Dynamic

11.1 Current Ukrainian Involvement

Some 228 Ukrainian specialists are already advising Gulf states on drone warfare, electronic warfare, and air defence tactics. President Zelenskyy has offered naval drone technology to Japan in exchange for air defence systems [M16] and has publicly positioned Ukraine as a willing partner in Gulf security. The startup Uforce is building Ukrainian drone boats for Western militaries. [M15]

11.2 The Political Obstacle

The principal obstacle to scaling Ukrainian involvement is political, not technical. The Trump administration's relationship with Ukraine is complicated by the ongoing Russia-Ukraine war, the minerals deal controversy, and the administration's reluctance to be seen as dependent on a country it has simultaneously pressured for concessions. This political dynamic is the single largest impediment to deploying the most cost-effective solution to the coalition's most pressing problem.

11.3 The Strategic Logic

The strategic logic for Ukrainian involvement is overwhelming. Ukraine has more operational experience in drone warfare than any other country. Its systems are cheap, proven, and available in quantity. The cost of a full Ukrainian drone package ($85–165 million) is trivial compared to the economic damage caused by the crisis – estimated at over $1 billion per day in lost oil revenue alone. [M1] Every day the Strait remains closed increases the pressure on food prices, fertiliser supplies, and energy security worldwide. The investment in drone technology to accelerate reopening would pay for itself within hours of the first convoy's safe passage.

Part XII: How the United States Should Change Its Tactics

12.1 Close the Strait to Iranian Oil Exports

The single most impactful tactical change the United States could make is to close the Strait of Hormuz to Iranian oil exports. Iran currently earns approximately $140 million per day from oil exports – revenue that funds the very weapons being used against the coalition. [M3] The coalition controls the Strait's southern approaches and could enforce a selective blockade against Iranian-flagged or Iranian-origin tankers while escorting allied shipping through.

This would be the mirror image of Iran's own selective-passage regime – and it would be far more damaging to Iran than to the coalition. Iran's economy is overwhelmingly dependent on oil revenue; cutting it off would accelerate the regime's strategic exhaustion.

12.2 Shift to Cheap Anti-Drone Defence

As detailed in Part IX, the current approach of using multi-million-dollar interceptors against cheap drones is unsustainable. The shift to Ukrainian interceptor drones, guns, and electronic warfare must be immediate and comprehensive.

12.3 Procure Ukrainian Systems at Industrial Scale

The recommended procurement of 100–150 Magura USVs, 3,000–5,000 interceptor drones, and associated systems at a total cost of $55–115 million should be treated as an emergency acquisition, bypassing normal procurement timelines.

12.4 Prioritise Mine Countermeasures

The removal of Avenger-class MCM ships from Bahrain in January 2026 was a strategic error. Expeditionary Sea Bases, LCS with MCM modules, and autonomous underwater vehicles must be surged to the Gulf immediately.

12.5 Engage China Diplomatically

China imports approximately 1.5 million b/d of Iranian oil and has significant leverage over Tehran. Engaging Beijing on Strait reopening – framing it as a shared economic interest rather than a US strategic demand – could open a diplomatic channel that bypasses the current US-Iran impasse.

12.6 The 48-Hour Ultimatum and Power Plant Targeting

Trump's 48-hour ultimatum to Iran, demanding full reopening of the Strait or face strikes on power plants, [M59] represents a significant escalation. Turkish-language TRT Haber reported the threat in detail. Power plant targeting would be devastating to Iran's civilian population – disrupting water systems, hospitals, and daily life – but would also cross a threshold that could trigger Iranian retaliation against Gulf energy infrastructure, as the IRGC explicitly warned. [M46a] The escalation risk must be weighed against the coercive benefit.

Part XIII: Alternative Routes and the LNG Problem

13.1 Existing Bypass Infrastructure

Two pipelines currently provide the only operational bypass of the Strait of Hormuz. Their combined capacity falls far short of the approximately 20 million b/d that normally transits the Strait.

Pipeline	*Operator*	*Capacity*	*Current Throughput*	*Terminus*	*Status*
Saudi East-West (Petroline)	Saudi Aramco	7 million b/d (nameplate)	~3.8 million b/d (surged to near 4 million b/d by 24 March)	Yanbu, Red Sea	Operating at or near capacity; Yanbu port is the bottleneck [R2] [R11]
UAE Habshan-Fujairah (ADCOP)	ADNOC	1.5 million b/d	~1.5 million b/d	Fujairah, Gulf of Oman	Operating at capacity; Fujairah is outside the Strait but within drone range from Iran [R1]

Pipeline	*Operator*	*Capacity*	*Current Throughput*	*Terminus*	*Status*
Combined		**~8.5 million b/d (nameplate)**	**~5.3 million b/d (actual)**		**Approximately 27% of normal Hormuz throughput**

The gap between nameplate capacity and actual throughput reflects port loading constraints. Yanbu was designed as a strategic reserve outlet, not as Saudi Arabia's primary export terminal. Its infrastructure – single-point moorings, storage tanks, and loading arms – cannot handle the volume of Ras Tanura, the kingdom's main Gulf terminal. [R4] [R18] Aramco's CEO confirmed the pipeline was hitting full capacity within days of the crisis, [R2] but the port itself cannot load tankers fast enough to match pipeline flow. Emergency measures – including floating storage and offloading (FSO) vessels and additional single-point moorings – could add capacity over weeks to months. [R4]

13.2 The LNG Gap

The most critical vulnerability is liquefied natural gas. Qatar's 80 million tonnes per year of LNG production from Ras Laffan – representing approximately 20 per cent of global LNG supply – has no bypass option whatsoever. LNG cannot be moved by pipeline in its liquid form; it must be regasified, piped as gas, and re-liquefied at a new export terminal. The cost and timeline for building such infrastructure are prohibitive in the short term. [R6] [R12]

The Arab Reform Initiative's analysis documented the cascading effects: "The closure of the Strait of Hormuz has triggered a severe energy crisis across the MENA region, with LNG-dependent economies facing acute shortages." [R6] Countries dependent on Qatari LNG – including Japan, South Korea, India, Pakistan, and several European states – face supply disruptions that cannot be resolved through pipeline alternatives.

13.3 Pipeline Expansion Opportunities

A crash programme of pipeline duplication offers the best return on investment over a 5–15 year horizon:

Project	*Timeline*	*Cost*	*Capacity Added*	*Terminus*
Saudi Petroline duplication (full second line)	3–5 years	$8–12 billion	+5–7 million b/d	Yanbu (Red Sea)
Yanbu port mega-expansion (deep water, VLCCs)	2–4 years	$3–5 billion	Matches pipeline capacity	Yanbu

Project	*Timeline*	*Cost*	*Capacity Added*	*Terminus*
UAE ADCOP2 (second Habshan-Fujairah line)	2–3 years	$2–3 billion	+1.5 million b/d	Fujairah (Gulf of Oman)
UAE-Duqm pipeline (new)	3–5 years	$5–8 billion	+1–2 million b/d	Duqm (Arabian Sea, Oman)
Saudi-Salalah pipeline (new)	5–7 years	$10–15 billion	+2–3 million b/d	Salalah (Arabian Sea, Oman)
IPSA pipeline rehabilitation	1–2 years	$1–3 billion	+1.6 million b/d	Mu'ajjiz/Yanbu (Red Sea)
Total potential additions		**$29–46 billion**	**+12–18 million b/d**	

If all projects were pursued simultaneously, the combined bypass capacity could theoretically approach or exceed the current 20 million b/d Hormuz throughput within 5–7 years. The total cost of $29–46 billion is substantial but modest compared to the economic damage of the crisis – estimated at over $1 billion per day in lost oil revenue alone. [R14]

13.4 Northern Pipeline Corridors

The northern corridors offer Mediterranean and Red Sea outlets that bypass both Hormuz and the Houthi threat zone, but they traverse some of the most politically unstable territory on earth.

Pipeline/Route	*Current Status*	*Capacity*	*Terminus*	*Key Risk*
Kirkuk-Ceyhan (Iraq-Turkey)	Restarted 18 March; one line at 250,000 b/d	1.65 million b/d (both lines)	Ceyhan, Mediterranean	Turkish leverage; Kurdish politics
Iraq-Syria (Baniyas)	850 km dormant since 1980s; tenders issued	Historical ~1 million b/d	Baniyas, Mediterranean	Syrian civil war aftermath; security
Iraq-Jordan (Basra-Aqaba)	Proposed; tenders for trucking issued	Proposed 1 million b/d	Aqaba, Red Sea	$18 billion cost; Aqaba north of Houthi range
IPSA (Iraq through Saudi to Red Sea)	Shut since 1990; infrastructure exists	1.6 million b/d	Mu'ajjiz, Red Sea	Saudi-Iraqi relations; maintenance

The AGBI reported that Iraq is actively pursuing all three routes – Turkey, Syria, and Jordan – simultaneously, recognising that "crude oil accounts for 90% of Iraq's state

revenue" and the Hormuz closure is existential. [R13] Turkey has proposed extending the Iraq pipeline system, positioning itself as an indispensable energy transit hub. [R22]

13.5 Canal Routes – Impractical

Several canal proposals have been discussed – a canal from the Gulf to the Gulf of Oman, from the Gulf to the Arabian Sea, or from the Gulf to the Red Sea. All are impractical. The terrain between the Gulf and the Gulf of Oman includes the Hajar Mountains (peaks above 3,000 metres). Costs would exceed $100–200 billion. Construction timelines would be measured in decades. Any canal would create a new chokepoint requiring its own defence. [R20] [R21]

13.6 The Houthi Prerequisite

Any strategy that routes oil or LNG through the Red Sea – whether via Yanbu, Jeddah, Aqaba, or a new Saudi Red Sea terminal – depends on the Red Sea being safe for shipping. It currently is not. The Reuters investigation of 25 March documented that the Western coalition's effort to secure Red Sea shipping cost billions of dollars and "ultimately failed against Yemen's Houthis," with four commercial ships sunk and the shipping industry still largely avoiding the route. [R17] The Houthis have now threatened to close the Bab al-Mandeb strait entirely. [R7]

This creates a paradox: the primary bypass for Hormuz runs through the Red Sea, but the Red Sea is itself contested. The coalition's inability to neutralise the Houthi threat – despite more than two years of military operations – suggests that air strikes alone cannot suppress a dispersed, low-tech missile and drone threat; that the cost-exchange ratio favours the attacker; and that without ground operations to seize launch sites, the threat persists indefinitely. The same dynamics apply at Hormuz, but at a much larger scale.

Solving the Houthi problem is therefore not a separate issue – it is a prerequisite for the entire bypass strategy.

13.7 Summary Assessment

Timeframe	*What Can Be Done*	*Capacity Gain*	*Key Constraint*
Immediate (0–3 months)	FSO vessels at Yanbu; maximise Petroline; restart Kirkuk-Ceyhan	+1–2 million b/d	Yanbu port bottleneck; Houthi/Iranian threat to Red Sea
Short-term (3–12 months)	Yanbu SPMs; pump station upgrades; Duqm expansion	+1–2 million b/d	Construction timelines; security of Oman ports
Medium-term (1–3 years)	IPSA rehabilitation; ADCOP2; Kirkuk-Ceyhan both lines	+3–5 million b/d	Political agreements (Iraq-Saudi, Iraq-Turkey)

Timeframe	*What Can Be Done*	*Capacity Gain*	*Key Constraint*
Long-term (3–7 years)	Petroline duplication; UAE-Duqm pipeline; Dolphin/Fujairah LNG	+8–12 million b/d	Capital ($30–50 billion); Houthi prerequisite
Very long-term (7–15 years)	Qatar LNG alternatives; Saudi-Salalah pipeline; northern corridors	+5–10 million b/d	Political stability of transit countries
Impractical	Canal routes (any variant)	Theoretical	Mountains, cost ($100–200 billion+), creates new chokepoint

In the short term, there is no substitute for reopening the Strait – the bypass gap is too large and LNG has no alternative at all. In the medium term (3–7 years), a crash programme of pipeline duplication costing $30–50 billion could close most of the crude oil gap but not the LNG gap. In the long term (10–15 years), a combination of pipeline expansion, new routes, and overseas LNG diversification could structurally reduce – but never eliminate – dependence on the Strait of Hormuz.

Part XIV: Diplomatic Options and Settlement Prospects

14.1 The Trump 15-Point Plan

The Trump administration transmitted a 15-point ceasefire plan to Iran via Pakistan in mid-March 2026. The plan demands:

Category	*Key Demands*
Nuclear	Complete dismantlement of enrichment programme; IAEA inspections
Strait	Immediate and unconditional reopening of Hormuz
Proxies	Disarmament of Hezbollah, Houthis, and Iraqi militias
Military	Withdrawal from contested islands; limits on ballistic missile programme
In exchange	Comprehensive sanctions relief; diplomatic normalisation; security guarantees

Iran rejected the plan within days. [D11] The demands are maximalist – effectively requiring Iran to dismantle its entire strategic deterrent in exchange for promises that a future US administration could reverse. No Iranian government could accept these terms without regime change.

14.2 Iran's Counter-Demands

Iran's counter-demands, transmitted through the same Pakistani channel, include: [D16]

Demand	*Implication*
Closure of all US military bases in the Gulf	Would end the US security architecture in the region
Reparations for damage caused by Operation Epic Fury	Politically impossible for any US administration
Hormuz transit fee modelled on the Suez Canal	Would give Iran permanent revenue and leverage
Recognition of Iranian sovereignty over Abu Musa and the Tunbs	Would end UAE territorial claims
Lifting of all sanctions with no snapback mechanism	Would remove all future leverage

These demands are equally maximalist. The gap between the two positions is enormous, and neither side has shown willingness to compromise.

14.3 The Pakistan Mediation Channel

Pakistan has emerged as the primary intermediary, leveraging its relationships with both Washington and Tehran. Pakistan's Prime Minister visited both capitals in March. [D14] Face-to-face US-Iran talks, possibly as early as 28 March in Islamabad, would represent the first direct diplomatic contact since the crisis began. Pakistan's motivation is partly self-interested – it depends on Iranian gas imports and Gulf remittances – but its intermediary role is genuine and has been accepted by both sides.

14.4 Selective Reopening as De-Escalation

Iran's selective-passage regime – allowing vessels from "non-hostile" states to transit under coordination with Tehran – may represent the beginning of a face-saving de-escalation. If the circle of permitted vessels gradually expands, the Strait could be functionally reopened without Iran formally conceding. [D16] [M60] [M61]

The risk is that selective reopening becomes a permanent arrangement, giving Iran de facto control over Strait access – a power it has never possessed and that no international legal framework supports. The coalition must decide whether to accept a pragmatic but legally problematic arrangement that restores oil flows, or to insist on the full legal principle of unimpeded transit passage.

14.5 China's Role

China imports approximately 1.5 million b/d of Iranian oil and is Iran's largest trading partner. Beijing has significant leverage over Tehran but has been reluctant to use it, preferring to position itself as a neutral mediator while benefiting from discounted Iranian crude. [D18] Engaging China on Strait reopening – framing it as a shared economic interest in global energy stability – could open a diplomatic channel that bypasses the current US-Iran impasse. China's own economic interests are directly

threatened by the crisis: higher energy prices slow Chinese growth and increase inflationary pressure.

14.6 The Island Dispute as Diplomatic Lever

The sovereignty dispute over Abu Musa, Greater Tunb, and Lesser Tunb is the most productive diplomatic lever available. Unlike nuclear issues or proxy disarmament – which are existential for the Iranian regime – the islands are a concrete, geographically defined issue that can be resolved through established international legal mechanisms.

If the coalition seizes the islands during military operations (as recommended in Part IV), they become a powerful bargaining chip. Returning them to Iran in exchange for concessions (nuclear limits, Strait guarantees, proxy withdrawal) would be a concrete, verifiable quid pro quo. Alternatively, international recognition of UAE sovereignty – backed by a Security Council resolution – could be offered as part of a package that also addresses Iran's security concerns.

The obstacle is that Iran's March 2026 rhetoric treats the islands as non-negotiable. However, the islands' military value to Iran is contingent on Iran's ability to project power in the Gulf – which is rapidly diminishing. If Iran's navy is destroyed and its coastal batteries neutralised, the islands become isolated outposts with no strategic value. At that point, Iran may calculate that trading sovereignty claims for sanctions relief and security guarantees is rational.

Part XV: Legal Framework

15.1 The Law of the Sea and Transit Passage

The Strait of Hormuz is an **international strait** under Part III of the United Nations Convention on the Law of the Sea (UNCLOS, 1982). Article 37 defines international straits as those "used for international navigation between one part of the high seas or an exclusive economic zone and another part of the high seas or an exclusive economic zone." [L1] [L2]

The key legal regime is **transit passage** (UNCLOS Articles 38–44), which provides that:

> "All ships and aircraft enjoy the right of transit passage, which shall not be impeded." (Article 38)
>
> "There shall be no suspension of transit passage." (Article 44)

This is a stronger right than innocent passage – it cannot be suspended even in wartime, and it applies to warships and submarines (which may transit submerged) as well as merchant vessels. [L1] [L2]

A critical legal complication is that **Iran, the United States, and Israel are all non-parties to UNCLOS**. [L3] However, the scholarly consensus is that the transit passage regime is "widely regarded as customary international law and binding on all States." [L1] This view is supported by the International Court of Justice's reasoning in the *Corfu Channel* case (1949), which established that states are required to ensure safe passage through international straits for neutral ships. [L3]

Iran disputes this. As Alexander Lott explains in EJIL Talk, "Iran considers that the regime of transit passage is not part of customary international law and only States Parties to UNCLOS are entitled to benefit from it." [L3] Iran's position is that only the more restrictive regime of innocent passage applies – which can be suspended for security reasons.

The weight of international legal opinion is against Iran. The San Remo Manual on International Law Applicable to Armed Conflicts at Sea (1994) provides that transit passage through international straits "shall not be impeded unless safe and convenient alternative routes are provided" (Rule 27). [L3] Hill Dickinson, a leading maritime law firm, concluded that "under international law and UNCLOS, Iran cannot legally hamper transit passage through an international strait." [L4]

15.2 The Legal Basis for Escort Operations

Escort operations are legally easier to defend than offensive strikes. Minesweeping, route clearance, escort, and defensive air cover can all be framed as protection of neutral commerce and seafarers. Once escorts begin conducting strikes ashore, however, the legal basis must move from mere protection of navigation toward self-defence, collective self-defence, UNSC authority, or some combination of the three. This distinction – between "reopening shipping" and "war against Iran" – is legally critical and operationally significant. [L1]

Bahrain has reportedly circulated a draft UNSC resolution seeking authorisation to protect Hormuz shipping. [L15] If adopted, this would provide the strongest possible legal basis for escort operations. Even without a resolution (which Russia and China would likely veto), the customary law right to protect neutral commerce and the collective self-defence provisions of the UN Charter provide a robust legal foundation.

15.3 Environmental Liability

The Persian Gulf is a semi-enclosed sea (UNCLOS Part IX) with special environmental obligations. The risk of catastrophic oil pollution arises from three scenarios: bombing of oil terminals and refineries (which could dwarf the 1991 Gulf War spill of 4–8 million barrels); attacks on tankers (a VLCC carries up to 2 million barrels); and damage to offshore platforms (sustained leaks from thousands of platforms). [L7]

The legal framework for environmental damage includes UNCLOS Part XII (states must "protect and preserve the marine environment," Article 192); the Rome Statute Article 8(2)(b)(iv) (war crime to intentionally launch an attack causing "widespread, long-term and severe damage to the natural environment"); and Additional Protocol I, Article 55 (care must be taken to protect the natural environment). [L8] [L9]

Amnesty International has called on "Israel, the US and the Islamic Republic of Iran [to] immediately cease or refrain from unlawful attacks on energy infrastructure." [L8] The UN High Commissioner for Human Rights warned that "attacks targeting civilian objects or infrastructure indispensable to the civilian population constitute serious violations of international humanitarian law." [L9]

15.4 The Island Dispute – Legal Dimensions

The dispute over Abu Musa, Greater Tunb, and Lesser Tunb has both legal and strategic dimensions. Iran seized Greater and Lesser Tunb by military force on 30 November 1971, two days before the UAE's independence. Abu Musa was subject to a 1971 Memorandum of Understanding between Iran and Sharjah for shared sovereignty, which Iran has systematically violated by militarising the island and restricting UAE access. [L10] [L11]

The UAE has repeatedly called for ICJ referral or direct negotiations. The GCC has consistently backed the UAE's position, and the EU backed the UAE's claim in October 2025. [L12] [L13] Iran refuses ICJ referral or any form of international arbitration. In March 2026, the Iranian military warned that "if any further aggression originates from [UAE] territory against the Iranian islands of Abu Musa and Greater Tunb… Iran's powerful armed forces will subject Ras Al Khaimah in the UAE to heavy strikes." [L10]

15.5 Demilitarisation Models – Åland and Svalbard

Two international precedents offer frameworks for resolving the island dispute as part of a comprehensive settlement.

The Åland Islands (Finland/Sweden). The Åland Islands lie between Finland and Sweden in the Baltic Sea. Their status was settled by the League of Nations in 1921 after Finland and Sweden came close to war – a dispute triggered, like the Gulf island dispute, by the withdrawal of an imperial power and competing historical claims. [L17] The solution combined sovereignty (granted to Finland) with complete demilitarisation, neutralisation, Swedish-language and cultural protection, autonomous governance, property restrictions, and a partial free trade zone. The arrangement has survived for over 100 years.

The Svalbard Archipelago (Norway/46 signatories). The 1920 Svalbard Treaty granted Norway "full and absolute sovereignty" while simultaneously granting all 46 signatory states equal rights to engage in commercial activities. Article 9 restricts military use: no naval bases, no fortifications, and the islands may not be used for "warlike purposes." [L18]

Feature	*Åland Islands*	*Svalbard*	*Proposed Gulf Application*
Sovereignty	Finland (League of Nations)	Norway (by treaty)	To be determined (ICJ or negotiated)
Demilitarisation	Complete	Partial (no bases, coast guard permitted)	Complete demilitarisation required
Neutralisation	Yes	Not formally	Desirable – neutral zone around Strait
Language/culture	Swedish only (minority protection)	Norwegian dominant	Arabic and Farsi rights guaranteed

Feature	*Åland Islands*	*Svalbard*	*Proposed Gulf Application*
Commercial access	Restricted (right of domicile)	Open to all 46 signatories	Free trade zone possible
Guarantor	League of Nations → international treaty	46 signatory states	UN/GCC/guarantor states
Duration	100+ years	100+ years	New arrangement

A proposed Gulf islands framework would combine complete demilitarisation and neutralisation of all three islands; deferred sovereignty (referred to the ICJ or placed in abeyance for 25 years); guaranteed Arabic and Farsi cultural and linguistic rights on Abu Musa; free trade zone status; and an international navigation safety zone around the islands with agreed traffic separation schemes and prohibition of military activity.

Part XVI: Conclusions and Recommendations

16.1 The Central Problem

The central problem is not Iranian military strength – which is being systematically degraded – but the sustainability of coalition defences. The cost-exchange ratio of 114:1 in Iran's favour for drone interception means the coalition is losing the war of attrition even while winning every tactical engagement. Unless the defensive approach is fundamentally changed, the coalition will run out of interceptors before Iran runs out of drones.

16.2 The Coalition Is Smaller Than Assumed

The practical coalition for Hormuz operations consists of the United States and France, with limited British air support and Gulf states providing basing and air defence. Italy has withdrawn. The United Kingdom can contribute one destroyer and four Typhoons. Germany, Spain, Japan, Australia, and Greece have declined to send naval forces. Saudi and UAE forces are stretched across multiple theatres. The 22-state coalition announced in early March is largely notional.

16.3 The Houthi Threat Cannot Be Separated from Hormuz

The primary bypass for Hormuz runs through the Red Sea. The Red Sea is contested by Houthi forces that the coalition has failed to neutralise despite two years of military operations and billions of dollars in expenditure. If the coalition cannot secure the Red Sea against the Houthis, the credibility of securing Hormuz against Iran is fundamentally undermined. Neutralising the Houthi threat is a prerequisite, not a separate campaign.

16.4 Diplomatic and Legal Dimensions Must Be Integrated

Military operations alone cannot produce a durable settlement. The island sovereignty dispute offers the most productive diplomatic lever – a concrete, geographically defined issue that connects directly to the military situation and can be resolved through established international legal mechanisms. The Åland and Svalbard models

demonstrate that sovereignty disputes can be managed through demilitarisation, cultural guarantees, and internationalised commercial access.

16.5 The Ukrainian Drone Recommendation Is Even Stronger

Every piece of evidence gathered since the original analysis reinforces the case for Ukrainian drone technology. The interceptor depletion data makes the cost-exchange argument overwhelming. The Magura USV's combat record against the Russian Black Sea Fleet demonstrates effectiveness against a far more capable adversary than the IRGC Navy. The total cost of a comprehensive Ukrainian drone package ($55–115 million) is trivial relative to the crisis costs. The only obstacle is political.

16.6 Ten Priority Actions

Priority	*Action*	*Timeline*	*Rationale*
1	Close the Strait to Iranian oil exports	Immediate (political decision)	Cuts Iran's $140 million/day war funding
2	Shift to cheap anti-drone defence	Immediate	Solves the 114:1 cost-exchange crisis
3	Procure Ukrainian USVs and interceptor drones at industrial scale	Days 1–30	Most cost-effective force multiplier
4	Deploy mine countermeasures assets to the Gulf	Immediate	Prevents mine threat from becoming decisive
5	Neutralise the Houthi threat to Red Sea bypass routes	Weeks 1–4	Prerequisite for bypass strategy
6	Suppress island and coastal air defences	Days 1–7	Enables all subsequent phases
7	Seize Abu Musa, Greater Tunb, and Lesser Tunb	Days 7–14	Eliminates island threat; creates diplomatic leverage
8	Begin convoy escort operations	Days 14–21	Restores oil flows
9	Emergency expansion of Yanbu port loading capacity	Weeks 1–8	Maximises bypass capacity
10	Engage China diplomatically on Strait reopening	Immediate	Leverages shared economic interest

16.7 The Bottom Line

The Strait of Hormuz can be reopened. The military capability exists within the US-French core of the coalition, supplemented by Gulf state forces and Ukrainian technology. The campaign would be difficult, costly, and prolonged – but it is feasible. The greater risk is not military failure but strategic exhaustion: running out of interceptors, losing political will, or allowing the crisis to become a permanent "new normal" in which Iran exercises de facto control over the world's most important energy chokepoint.

The most important investments are not in additional warships or aircraft but in cheap, scalable, proven technologies – Ukrainian interceptor drones, naval surface drones, and electronic warfare systems – that reverse the cost-exchange ratio and make sustained operations affordable. The most important diplomatic move is not the 15-point plan (which Iran has rejected) but the island dispute, which offers a concrete path to a settlement that addresses both sides' core concerns.

Time is not neutral. Every day the Strait remains closed costs the global economy over $1 billion in lost oil revenue, drives food and energy prices higher, and strengthens Iran's negotiating position. The coalition must act with urgency – not because the military situation is desperate, but because the economic and political costs of delay are compounding daily.

Annex A: Source Reliability and Bias Assessment

The following tables assess the reliability and political or national bias of all sources cited in this report. Sources are grouped by type and, within each table, ordered first by country – International, then United States, then all other countries in alphabetical order – and alphabetically by publication name within each country.

A.1 Government and Military Sources

Source	*Country*	*Type*	*Reliability*	*Bias/Notes*
IAEA	International	UN agency	Very high	Authoritative on nuclear matters
IMO	International	UN agency	High	Authoritative on maritime safety
US CENTCOM	USA	Military command	High for operational data	Tends to present optimistic picture of campaign progress; "peak-to-current" framing exaggerates degradation
US Department of War (Pentagon)	USA	Government	High for official positions	Political messaging overlaid on military data; Hegseth briefings mix fact with advocacy
US Energy Information Administration (EIA)	USA	Government agency	Very high	Non-partisan; gold standard for energy data
Finnish Ministry for Foreign Affairs	Finland	Government	Very high	Authoritative on Åland Islands regime

Source	*Country*	*Type*	*Reliability*	*Bias/Notes*
French Ministry of Armed Forces	France	Government	High	Relatively transparent on deployments; Senate budget committee more candid on readiness
French Senate Defence Committee	France	Legislature	Very high	Unusually candid; budget scrutiny reveals readiness gaps
Saudi Ministry of Defence	Saudi Arabia	Government	Medium–high	Limited public data; Okaz newspaper often more informative
UAE Ministry of Defence	UAE	Government	High for interception data (pre-March 11)	Stopped publishing interception rates after March 11 – likely due to depletion concerns
UK Ministry of Defence	UK	Government	High for UK deployments	Understates readiness problems; Navy Lookout often more candid

A.2 Think Tanks and Research Institutes

Source	*Country*	*Type*	*Reliability*	*Bias/Notes*
Arab Reform Initiative	International	Think tank	High	Progressive Arab perspective; good on energy and economic analysis
International Crisis Group	International	NGO	Very high	Conflict resolution focus; diplomatic-options emphasis

Source	*Country*	*Type*	*Reliability*	*Bias/Notes*
AGSI (Arab Gulf States Institute)	USA	Think tank	High	Pro-Gulf perspective; excellent on Gulf military data
Arab Center DC	USA	Think tank	High	Arab perspective on US policy; good on GCC dynamics
Cato Institute	USA	Think tank	High	Libertarian/non-interventionist; useful counterpoint to hawkish consensus
FDD (Foundation for Defense of Democracies)	USA	Think tank	Medium–high	Hawkish; anti-Iran; Long War Journal is factually reliable
FPRI	USA	Think tank	High	Moderate; strong on military analysis
ISW/CTP (Understanding War)	USA	Think tank	Very high for daily tracking	Pro-interventionist lean; excellent daily data compilation
MEI (Middle East Institute)	USA	Think tank	High	Moderate; good regional expertise; Freilich pieces are policy advocacy
JISS (Jerusalem Institute for Strategy and Security)	Israel	Think tank	High	Pro-Israel security establishment; useful for Israeli strategic thinking

A.3 News Agencies and Wire Services

Source	*Country*	*Type*	*Reliability*	*Bias/Notes*
Reuters	International	Wire service	Very high	Gold standard; some articles blocked by bot protection
Associated Press (AP)	USA	Wire service	Very high	Reliable; good on Ukraine drone coverage
AFP	France	Wire service	Very high	Reliable
Anadolu Agency	Turkey	State wire service	Medium–high	Turkish government perspective; factually generally reliable but framing reflects Ankara's interests

A.4 Newspapers and Magazines (English-language)

Source	*Country*	*Type*	*Reliability*	*Bias/Notes*
The Atlantic	USA	Magazine	High	Frum's pieces are well-sourced opinion
Forbes	USA	Business magazine	Medium–high	Variable quality; some articles blocked
Time	USA	News magazine	High	Good long-form analysis
Haaretz	Israel	Broadsheet	High	Centre-left; excellent security reporting; often breaks Israeli intelligence stories; paywalled
Jerusalem Post	Israel	Broadsheet	Medium–high	Centre-right; pro-Israel; useful for IDF data

Source	*Country*	*Type*	*Reliability*	*Bias/Notes*
Al Jazeera English	Qatar	News network	Medium–high	Qatari perspective; good regional coverage; anti-Saudi lean
Al Arabiya English	Saudi Arabia	News network	Medium–high	Saudi perspective; useful for Gulf data; anti-Iran lean
Arab News	Saudi Arabia	Newspaper	Medium	Saudi government-aligned; useful for Saudi military data
The National	UAE	Newspaper	Medium–high	UAE government-aligned; good on UAE military and economic data
Financial Times	UK	Business broadsheet	Very high	Excellent on energy and economic dimensions
Iran International	UK (Iranian exile)	News network	Medium–high	Anti-regime; Saudi-funded; factually generally reliable but editorially hostile to Tehran
Middle East Eye	UK	Online	Medium–high	Independent; good regional analysis; occasionally sensationalist
The Guardian	UK	Broadsheet	High	Centre-left; good on UK defence readiness gaps

Source	*Country*	*Type*	*Reliability*	*Bias/Notes*
The Times	UK	Broadsheet	High	Centre-right; good defence coverage; some articles paywalled

A.5 Newspapers and Magazines (Non-English)

Source	*Country*	*Language*	*Type*	*Reliability*	*Bias/Notes*
Ahram Gate	Egypt	Arabic	Newspaper	Medium–high	Semi-official; more analytical than Youm7
Youm7	Egypt	Arabic	Newspaper	Medium	Egyptian government-aligned; useful for Egyptian perspective
Le Figaro	France	French	Broadsheet	High	Centre-right; good defence coverage
Mer et Marine	France	French	Specialist	Very high	Gold standard for French naval matters
Press TV	Iran	English	State broadcaster	Low–medium	Iranian state propaganda; useful only when claims are independently corroborated
Calcalist	Israel	Hebrew	Business newspaper	High	Good on defence procurement and costs
Globes	Israel	Hebrew	Business newspaper	High	Excellent economic/strategic analysis

Source	*Country*	*Language*	*Type*	*Reliability*	*Bias/Notes*
i24news	Israel	Hebrew/multilingual	News network	Medium–high	Moderate; good intelligence reporting
Israel Hayom	Israel	Hebrew	Newspaper	Medium	Right-leaning; close to Netanyahu government; factual claims need cross-checking
Nesan	Jordan	Arabic	Online	Medium	Jordanian; analytical; opinion-heavy
Roya News	Jordan	Arabic	News network	Medium–high	Jordanian; good factual reporting on coalition and mine data
Al Mayadeen	Lebanon	Arabic	News network	Medium	Pro-Iran/Hezbollah; useful for Iranian perspective but must be cross-checked
Atheer	Oman	Arabic	Newspaper	Medium–high	Omani perspective; valuable for Oman's neutral-leaning analysis
Al Jazeera Arabic	Qatar	Arabic	News network	Medium–high	Qatari perspective; Arabic edition often more detailed than English

Source	*Country*	*Language*	*Type*	*Reliability*	*Bias/Notes*
Asharq Al-Awsat	Saudi Arabia/UK	Arabic	Pan-Arab broadsheet	Medium–high	Saudi-owned; moderate; good Arabic-language analysis
Okaz	Saudi Arabia	Arabic	Newspaper	Medium–high	Saudi; often more candid on military matters than English-language Saudi press
Euronews Turkish	Turkey	Turkish	News network	High	European perspective in Turkish; reliable
IndyTurk	Turkey	Turkish	Online	Medium–high	Independent Turkish; critical of government; good analysis
TRT Haber	Turkey	Turkish	State broadcaster	Medium	Turkish government perspective; factually reliable on Turkish policy
Al Khaleej	UAE	Arabic	Newspaper	Medium–high	UAE; most detailed interception figures found here

A.6 Specialist Defence and Maritime Sources

Source	*Country*	*Type*	*Reliability*	*Bias/Notes*
Naval News	International	Specialist	Very high	Authoritative on naval matters
Breaking Defense	USA	Defence news	High	Good on US defence policy and procurement

Source	*Country*	*Type*	*Reliability*	*Bias/Notes*
Defense Security Monitor	USA	Defence analysis	High	Good strategic analysis
ENR (Engineering News-Record)	USA	Engineering trade	Very high	Authoritative on infrastructure capacity
Military Times	USA	Defence news	High	Good on US military operations
Small Wars Journal	USA	Professional journal	High	Good on irregular warfare and drone tactics
USNI News / Proceedings	USA	Professional journal	Very high	US Naval Institute; authoritative
Army Recognition	Belgium	Defence news	High	Good on equipment and capabilities
Pipeline Journal	Germany	Specialist	Very high	Authoritative on pipeline infrastructure
Janes	UK	Defence intelligence	Very high	Gold standard for military capabilities data
Navy Lookout	UK	Specialist blog	Very high	Best independent source on Royal Navy readiness; run by former RN personnel

A.7 Legal Sources

Source	*Country*	*Type*	*Reliability*	*Bias/Notes*
EJIL Talk	International	Academic blog	Very high	European Journal of International Law blog; authoritative

Source	*Country*	*Type*	*Reliability*	*Bias/Notes*
Just Security	USA	Academic/legal	Very high	NYU Law School; excellent on law of armed conflict
Chatham House	UK	Think tank	Very high	Authoritative on international law

Note. The Finnish Ministry for Foreign Affairs, cited in the legal framework for its authoritative account of the Åland Islands regime, is listed under Government and Military Sources (A.1) rather than Legal Sources.

Annex B: Non-Roman Script Bibliography

The following entries reproduce the original-script titles for all non-English sources cited in this report, with romanised transliteration and English translation. This annex is provided to enable verification by readers with the relevant language skills.

Reference	*Language*	*Original Title*	*Transliteration*	*English Translation*
[M44]	Hebrew	3 תרחישים לפתיחת מצר הורמוז	3 tarsishim le-ftikhat metzar Hormuz	3 scenarios for opening the Strait of Hormuz
[M45]	Arabic	كيف: تكتيكات مركبة تصل صواريخ إيران	Taktikat murakkaba: kayf taṣil ṣawārīkh Irān	Complex tactics: How do Iran's missiles reach their targets
[M46]	Turkish	IEA: İran savaşı küresel ekonomi için büyük tehdit oluşturdu	(as written)	IEA: The Iran war has created a major threat to the global economy
[M47]	Arabic	مرحلة جديدة بالحرب على إيران	Marḥala jadīda bi-l-ḥarb ʿalā Irān	A new phase in the war on Iran
[M48]	Arabic	إيران تهدد بقصف محطات الطاقة الخليجية	Irān tuhaddid bi-qaṣf maḥaṭṭāt al-ṭāqa al-khalījiyya	Iran threatens to bomb Gulf energy stations
[M49]	Hebrew	הם על הקצה	Hem ʿal ha-qatzeh	They are on the edge
[M50]	Turkish	İran'ın elinden Hürmüz kartını almak	(as written)	Taking the Hormuz card from Iran's hand
[M51]	Turkish	Trump 'İran Savaşı'nda yol ayrımında	(as written)	Trump at a crossroads in the 'Iran War'
[M55]	Hebrew	דיווח: איראן תאפשר מעבר כלי שיט יפניים	Divuaḥ: Iran te'afsher maʿavar klei shayit yapaniyim	Report: Iran will allow passage of Japanese vessels

Reference	*Language*	*Original Title*	*Transliteration*	*English Translation*
[M56]	Hebrew	טראמפ: איראן הסכימה לוותר על הנשק הגרעיני	Trump: Iran hiskima levater ʿal ha-nesheq ha-garʿini	Trump: Iran has agreed to give up nuclear weapons
[M57]	Arabic	تحالف دولي يضم 22 دولة	Taḥāluf dawlī yaḍumm 22 dawla	An international coalition of 22 states
[M58]	Arabic	وول ستريت جورنال : إيران تزرع ألغاما بحرية	Wūl Strīt Jūrnāl: Irān tazraʿ alghāman baḥriyya	WSJ: Iran plants naval mines in the Strait of Hormuz
[M59]	Turkish	Trump, Hürmüz Boğazı'nı açması için İran'a 48 saat süre verdi	(as written)	Trump gives Iran 48 hours to open the Strait of Hormuz
[M60]	Turkish	İran: Tahran'la koordinasyon içinde gemiler geçebilecek	(as written)	Iran: Ships can pass through Hormuz in coordination with Tehran
[M61]	Arabic	مجلس الدفاع الإيراني: السبيل الوحيد لعبور مضيق هرمز	Majlis al-difāʿ al-Irānī: al-sabīl al-waḥīd li-ʿubūr maḍīq Hurmuz	Iranian Defence Council: The only way to cross Hormuz
[M62]	Arabic	إيران تنفي إغلاق هرمز	Irān tanfī ighlāq Hurmuz	Iran denies closing Hormuz
[M64]	Arabic	هندسة الاستنزاف في الحرب الإيرانية	Handasat al-istinzāf fī al-ḥarb al-Irāniyya	Engineering of attrition in the Iranian war
[M66]	Arabic	ناقلتان هنديتان للغاز تعبران مضيق هرمز	Nāqilatān hindiyyatān li-l-ghāz taʿburān maḍīq Hurmuz	Two Indian gas tankers cross the Strait of Hormuz
[M75]	French	La Royal Navy compte le plus faible nombre de navires	(as written)	The Royal Navy has the lowest number of ships

Reference	*Language*	*Original Title*	*Transliteration*	*English Translation*
[M85]	French	Dispositif militaire français au Moyen-Orient	(as written)	French military deployment in the Middle East
[M86]	French	Opération Prométhée: 415 jours de déploiement	(as written)	Operation Prometheus: 415 days of deployment
[M95]	French	Projet de loi de finances pour 2026: Défense	(as written)	Finance bill for 2026: Defence
[M99]	Arabic	السعودية وعُمان تطلقان تمريناً بحرياً مشتركاً	Al-Saʿūdiyya wa-ʿUmān tuṭliqān tamrīnan baḥriyyan mushtarakan	Saudi Arabia and Oman launch joint naval exercise
[M100]	Arabic	القوات البحرية تعوّم أولى سفنها القتالية	Al-quwwāt al-baḥriyya tuʿawwim ūlā sufunihā al-qitāliyya	Naval forces float first combat ship
[M102]	Arabic	الدفاعات الجوية الإماراتية	Al-difāʿāt al-jawwiyya al-Imārātiyya	Emirati air defences

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[M2] US Energy Information Administration. (2019). The Strait of Hormuz is the world's most important oil transit chokepoint. *EIA*. https://www.eia.gov/todayinenergy/detail.php?id=39932

[M3] Navy Lookout. (2026, March 9). No ships in the Strait of Hormuz – brace for global economic shock? *Navy Lookout*. https://www.navylookout.com/no-ships-in-the-strait-of-hormuz-brace-for-global-economic-shock/

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[M5] Army Recognition. (2026). Iran builds layered missile and mine shield against U.S. carriers in Strait of Hormuz. *Army Recognition*. https://armyrecognition.com/news/army-news/2026/iran-builds-layered-missile-and-mine-shield-against-u-s-carriers-in-strait-of-hormuz

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[M7] USNI News. (2026, March 9). French Navy pledges 10 additional warships to Middle East, escorts for Strait of Hormuz. *USNI News*. https://news.usni.org/2026/03/09/french-navy-pledges-10-additional-warships-to-middle-east-escorts-for-strait-of-hormuz

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