



By: TA | AP Insight

Is Tehran overestimating its position in relation to the Strait of Hormuz?



The Strait of Hormuz is, by some accounts, named for a **Zoroastrian** deity destined to emerge victorious after a 9,000-year standoff with an adversary.

Iran's leaders feel their own victory is at hand and won't require the same epic patience.

They are betting that military pressure will ultimately force the United States to accept their control over the crucial waterway for global energy — and that time is on their side.

They know about the **diminishing stockpiles** of key U.S. weapons such as advanced missile interceptors.

They know the war is deeply **unpopular with Americans**. They know that as long as the strait is largely closed, the price of gas and other goods will stay high ahead of U.S. congressional elections in November.

They know that trying to open it by force would be costly and may require **American ground troops**.

They know their **Houthi** allies in Yemen could widen the war and disrupt another major trade route.

By that logic, U.S. President Donald Trump has no choice but to **capitulate**. But Iran's strategy carries risks.

Trump points to strikes that have decimated Iran's top leadership, navy and air force.

He alternates between threatening escalation and saying talks are going well.

Iran's own **economy** has been battered, in part because of a U.S. blockade. Iranians rose up in mass protests just months ago and could do so again.

And Iran's leaders need only look to how Trump's "**short-term excursion**" to the Middle East has bogged down to be reminded that wars rarely turn out as expected.

An evolving deal could give Iran a major win

Iran says it is close to reaching a **deal with Oman** to manage the strait, which runs between the two countries.

But it would be conditioned on the U.S. lifting its blockade, so even if there are no direct negotiations — as Iran says — Trump would have to approve.

It's unclear whether the deal would allow Iran to charge fees. But it would formalize its control over what had been an open international waterway before the war, one that carried a fifth of the world's traded oil and gas.

More than revenue from the strait, Iran wants to confirm its management and sovereignty over the strait - Abdolreza Davari

Abdolreza Davari, an analyst who once advised former President Mahmoud Ahmadinejad, said Iran's effective control of the strait has given it leverage with the U.S. and regional countries that can help guarantee its security.

"More than revenue from the strait, Iran wants to confirm its management and sovereignty over the strait," he said by phone from Tehran.

Formal control over even part of the strait would be a clear win for Iran and a loss for the U.S., which has yet to accomplish some of its various and shifting goals in the war.

It would also deal a blow to global norms on freedom of navigation and set a precedent that much of the world would find disturbing — that nations can shut down trade choke points at will.

China, which buys oil from Iran and has influence over it, said as recently as May that "**normal and safe passage**" through the strait should be restored.

Iran feels time is on its side

To borrow a phrase from **Trump's own theory of geopolitics**, Iran believes it holds the cards.

"They started the war, but its end was never with them. We always decide for ourselves when it ends," Mahdi Mohammadi, an adviser to Iran's chief negotiator, posted on social media. "Iran is going after the enemy's defeat – not an agreement."

He said a surprise Iranian **attack on Jordan** in July "compensated" for a drop in oil prices. That contributed to the collapse of an interim agreement reached in June that had offered significant concessions to Iran, including a U.S. waiver to sell oil internationally and the promise of broader sanctions relief.

Control of the strait would give Iran leverage if the nuclear talks resume - Rahman Ghahremanpour

Iran has repeatedly said the Strait of Hormuz will not go back to being an open waterway, and that it will keep attacking ships trying to transit without its permission. Iran's joint military command has called it an "unbreakable red line."

"For Iran, the Strait of Hormuz has become a strategic lever for deterrence, maintaining the regional balance of power, and reshaping the security rules in the Persian Gulf," said Mostafa Najafi, a Tehran-based security analyst.

That poses a major obstacle to ending the war, much less resolving the even more complex, long-standing dispute over Iran's nuclear program.

"The atomic issue, because of the conflict in the Strait of Hormuz, has been pushed to the side, and in reality, that is in Iran's interests," said Rahman Ghahremanpour, an Iran-based analyst. Control of the strait would give Iran leverage if the nuclear talks resume, he added.

It's still a risky gamble

The **economic fallout** from the war has spread worldwide but is particularly acute in Iran.

U.S. and Israeli strikes have pummeled its industrial base. The U.S. blockade has choked off much of its oil exports. Iranians are grappling with triple-digit food inflation.

Trump has repeatedly threatened major strikes on civilian infrastructure like water and electricity.

In December, a currency crisis sparked some of the biggest anti-government protests in the 47-year history of the Islamic Republic.

Authorities responded with a bloody crackdown in which thousands were killed and tens of thousands detained.



If Iran doesn't strike a deal soon, then economic recovery will be difficult - Mohammad Javad Zarif

Many in Iran, including those close to its moderate President Masoud Pezeshkian, fear it may go too far.

Mohammad Javad Zarif, who as foreign minister helped negotiate the 2015 nuclear deal, wrote in a recent essay that Iran's achievements in the war had opened "an exceptional window for diplomacy."

But he warned that if it doesn't strike a deal soon, then "economic recovery will be difficult, and the possibility of internal unrest or renewed aggression, especially after the U.S. elections, cannot be ruled out."

The war has already been marked by surprises.

After the first wave of U.S. and Israeli airstrikes on Feb. 28 killed Iran's supreme leader and other top officials, Trump suggested it would be over in a matter of weeks.

Instead, the conflict has emboldened Iran's leaders and mobilized their supporters. Tehran is using the strait "to show that it has not been defeated," Ghahremanpour said. "It can increase its legitimacy at home."

But the strategy could also backfire. Iran's resilience has limits and there are concerns that an economic crash could trigger unrest. "Iran cannot continue with this strategy forever, and at a certain point, in reality, it has to reach a deal with America," he said.

But Davari said that for now, Iran can withstand the pressure. "It's unlikely, despite the difficulties of the economic situation, that Iran will retreat from its positions," he said.