

# The Hormuz Strait Threat Won't Derail US Strategy in Iran War



A gas tanker at anchor as traffic is down in the Strait of Hormuz amid the Iran war, in Shinas, Oman, on March 11, 2026. Benoit Tessier/Reuters

**by Conrad Black**

As is the norm when political events in uncivilized places become violent, stock and related commodity prices become volatile and usually overreact. This has certainly occurred with [oil prices](#) responding to developments in the Iran war. The U.S. administration has already [waived](#) the Jones Act to facilitate the delivery of foreign oil in foreign ships to U.S. ports and announced increased supply from the Naval oil reserve.

The United States is now an energy self-sufficient country, so concerns within the United States itself about the oil price

are unfounded. The current [spike in California](#) is entirely the responsibility of successive state governments conducting an unholy war on the oil industry that has caused a drastic reduction of California's oil refining capacity. However, even California will not long be troubled by this burden.

The principal concern is the Strait of Hormuz, through which 20 percent of the world's oil traffic passes, and it has Iran on its northern shore at its narrowest point. The beleaguered and decapitated Iranian regime has purported to close the Strait with mines and rocket fire, to which oil tankers—immense and slow-moving ships filled with inflammable cargoes—are especially vulnerable. President Trump and other U.S. military and civilian officials have said the U.S. Navy will open the Strait of Hormuz, and U.S. strikes have already [severely damaged](#) the military installations on Kharg Island, Iran's principal oil shipment point, as well as the place of chief military concentration near the Strait. No one should doubt the ability of the American military to prevail in this matter. Approximately 90 percent of Iran's missile-firing capability and 95 percent of its drone-launching capability have already been destroyed, and its navy has been [almost entirely destroyed](#).

An interesting game is now afoot, in which the United States is [inviting other countries](#), whose oil supplies are threatened by Iran, to join it in a naval sweep of the Strait to reopen it. Iran is inviting some of the same countries to abstain from supporting the American and Israeli effort in exchange for Iran not disturbing tankers carrying oil to them through the Strait of Hormuz. The most important player in this game is likely China: [if China contributes](#) ships in symbolic solidarity with the United States, Trump will continue to permit Iran to ship oil to China. If it doesn't, he will not only shut down Iranian oil exports, but he will also leave China, after the cutoff of oil from Venezuela, scrambling for supply.

Any NATO country that effectively makes a deal with Iran rather than with the United States could be facing unpleasant American counteraction, from diluted security of the United States within NATO to further aggressive action on the tariff front. The waffling by British Prime Minister Starmer, Canadian Prime Minister Carney, and French President Macron

comes perilously close to outright relativism between the great ally upon whom they are ultimately dependent, and the principal terrorism-sponsoring state in the world. Those and other leaders of ostensible American allies have wobbled back and forth, disapproving the Iranians approximately two to three times as emphatically as the U.S.–Israelis.

German Chancellor Friedrich Merz has declared that this is not a NATO matter because NATO is a defensive alliance, as if Iran had not constantly sponsored acts of terrorist aggression against most NATO countries countless times over the nearly half-century of the baneful existence of the Islamic Republic of Iran. Merz has at least recognized that the United States and Israel are "[doing the dirty work](#) for all of us."

Given the correlation of forces between the now almost emasculated Iran attempting to disrupt the world's oil supply as it desperately represses the virulent hatred toward the Islamic Republic of the great majority of its population, and the overwhelming strength and precision of the American and Israeli forces trained up to the highest levels of elite military professionalism, it is a practical impossibility for this war to continue beyond the five weeks that Trump and his entourage predicted, unless the allies choose for tactical reasons to reduce the intensity of their assault, which is unlikely.

The great achievement of this war will be the absolute destruction of those armed elements that were prepared to commit acts of continuous terror and barbarism in opposition to the general acceptance of the right of Israel to exist as a Jewish state. As long as those forces existed and were active, peace was impossible. All the talk about a two-state solution for decades was impractical. The attempts of the Obama and Biden administrations and some others to appease Iran was a complete failure.

Even the Western Europeans acknowledge that the thought of a nuclear-armed Iran, a fate to which they were collectively

resigned and in which they were complicit, was an unacceptable danger to civilization. There will soon be a possibility to rebuild Gaza as a peaceful and prosperous place, and for Lebanon, despite its Muslim-Christian frictions, to become a functioning state for the first time in 50 years. Iran will be quickly reconstructed and resume its status of more than 3,000 years as a serious and respected nation.

And then it will be time to consider NATO's direction. I have long advocated that it become a worldwide defensive alliance of countries that meet a reasonable threshold of respect for human rights, ensuring existing borders of its members (which would require some precision in Israel's case), and also acting preemptively against legitimate threats to world security from rogue regimes such as the Islamic Republic of Iran. It cannot continue that the United States bears an inordinate burden of NATO's cost while not receiving even the comradely acknowledgement of the leading powers of Western Europe that collaboration in securing their own oil supplies in cooperation with the Americans is preferable to making craven deals with the Iranian regime—a regime that they all profess to regard as morally repugnant but have done absolutely nothing to contain.

There is room for criticism of President Trump's diplomatic techniques, but in policy terms his motives are exemplary and his success has been astonishing. And as a bonus, the 67-year ordeal of communist Cuba is about to end, and that pleasant island will join Syria, Venezuela, and Iran in dropping out of the Russo-Chinese orbit and into America's lap.

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