



Delhi Policy Group

Advancing India's Rise as a Leading Power



POLICY BRIEF

The Iran War and Maritime Security

Author

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Volume XI, Issue 10

March 25, 2026



Delhi Policy Group

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www.delhipolicygroup.org



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Cover Images:

President Donald J. Trump Monitors U.S. Military Operations in Iran: Operation Epic Fury, February 28, 2026.

Source: [X/White House](#)

The USS Abraham Lincoln Carrier Strike Group (CSG) actively supporting Operation Epic Fury, a major U.S.-led military campaign against Iran that began on February 28, 2026. Source: [X/@CENTCOM](#)

After navigating through the Strait of Hormuz, the second Indian-flagged liquefied petroleum gas (LPG) tanker, Nanda Devi, arrived in Gujarat on March 17, 2025. Source: [X/@sarbanandsonwal](#)

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The Iran War and Maritime Security

by

Lalit Kapur

Iran's closure of the Strait of Hormuz in response to US Operation Epic Fury and Israeli Operation Roaring Lion has brought the world to the threshold of change in a fundamental precept enshrined in the UN Convention on the Laws of the Sea (UNCLOS) – that of Freedom of the Seas¹. This, inter alia, also includes Freedom of Navigation, particularly within territorial seas and exclusive economic zones, where UNCLOS permits ships of all nations, including warships, the right of innocent and unencumbered passage². The closure disrupts global maritime trade and particularly energy flows through a vital maritime choke point, severely impacting the global economy.

The United States, as the world's premier enforcer of freedom of navigation has, despite its best efforts, been unable to normalise shipping flows through the Strait so far. The Houthis, who had similarly strangled shipping through the Red Sea for two years through their attacks in the Strait of Bab-el-Mandeb, have threatened to close the Red Sea shipping lane again. China, through enforcement of national law that is in contravention of its commitments under UNCLOS, seeks to curtail freedom of navigation within what it claims are its waters, including its EEZ and the disputed South China Sea. Other countries of the Global South have voiced a stance limiting freedom of navigation, notwithstanding their commitment to UNCLOS, though they lack the power to act on their view. Even India's MZI Act of 1976 contains provisions that are not in consonance with UNCLOS, though India does not enforce these provisions³.

The question then is, can US and Western might succeed in negating multiplying challenges to the Freedom of the Seas?

On February 28, 2026, US CENTCOM launched Operation Epic Fury to dismantle the Iranian regime's security apparatus, prioritising locations that posed an imminent

¹ The precept pertaining to freedom of the seas is spelt out at Article 87 of UNCLOS.

² For a detailed examination of Freedom of Navigation, see Lalit Kapur, "Freedom of Navigation: Different Strokes for Different Folks", DPG Policy Brief Volume III Issue 4, March 22, 2018, https://www.delhipolicygroup.org/storage/uploads/publications_file/freedom-of-navigation-different-strokes-for-different-folks-1083.pdf

³ For an examination of India's position, see Lalit Kapur, "Reading the USS John Paul Jones FONOP Right", DPG Policy Brief Volume VI Issue 13, April 14, 2021, https://www.delhipolicygroup.org/storage/uploads/publications_file/reading-the-uss-john-paul-jones-fonop-right-2291.pdf

threat⁴. Stated objectives of the operation were to eliminate the imminent nuclear threat posed by the Iranian regime, destroy its ballistic missile arsenal, degrade its proxy terror networks and cripple its naval forces⁵. President Trump estimated that the operation would last 4-5 weeks. Israel simultaneously launched Operation Roaring Lion, aiming to remove existential threats posed to it by Iran's financing, training and arming of proxies, and to bring political pressure to bear on the Iranian regime⁶. Concurrently, Israel launched strikes on the Hezbollah in Lebanon.

The US-Israeli operations were successful in eliminating Iran's senior leadership, including Ali Khamenei, the Supreme Leader, and over 40 senior members of the IRGC, Iranian military, intelligence apparatus and paramilitary forces. Striking thousands of targets, they were also successful in eliminating Iran's air defences and obtaining air superiority, severely damaging Iran's defence industrial base, and virtually eliminating Iran's surface fleet. They were not, however, successful in shutting down Iran's ability to launch ballistic missile and drones.

In response, Iran has effectively harnessed its strategic geography and relatively inexpensive military technology and declared the Strait of Hormuz closed. The impact has been immediate. Shipping through the Strait has dropped to near zero, resulting in severe disruption to global supply chains. Energy prices have surged from around \$ 70 to over \$ 100 per barrel, with estimates indicating that they could rise to as much as \$ 200 if the Strait remained closed for a prolonged period. LNG prices too have surged, while exports from and imports to the region by sea have been shut down. Shipment of nitrogen-based fertilisers has been disrupted, threatening the world with non-availability of fertiliser during the crop planting season. Estimates indicate that the world GDP could contract by 2.9% if the closure continues through the second quarter of 2026. The primary impact will be on Asia (including India) and Europe. Mid-term election prospects in the US may also be impacted.

Iran has not been able to control the Strait of Hormuz, in that its own vessels are unable to use the waterway for productive purposes. It has, however, been able to deny usage to the rest of the world. Only ships from selected countries (including India) have been allowed to pass unhindered through the strait, with Iran's prior approval. Its parliament is reported to be considering a proposal requiring countries using the

⁴ US Forces Launch Operation Epic Fury, February 28, 2026, <https://www.centcom.mil/MEDIA/PRESS-RELEASES/Press-Release-View/Article/4418396/us-forces-launch-operation-epic-fury/>

⁵ Peace Through Strength: President Trump Launches Operation Epic Fury to Crush Iranian Regime, End Nuclear Threat, March 1, 2026, <https://www.whitehouse.gov/articles/2026/03/peace-through-strength-president-trump-launches-operation-epic-fury-to-crush-iranian-regime-end-nuclear-threat/>

⁶ Operation Roaring Lion, February 28, 2026, <https://www.idf.il/en/mini-sites/operation-roaring-lion/>

waterway to ship food and energy supplies to pay a toll, effectively a security tax, to the IRGC. Such a proposal, if Iran can enforce it, would effectively put an end to freedom of navigation in the Persian Gulf, and set a precedent for other revisionist powers.

For all its vaunted power, the US Navy has not yet been able to obtain sufficient control over the critical Strait to ensure freedom of navigation for its own warships, let alone the global merchant fleet. It is unlikely to be able to do this so long as Iran has the ability to launch threatening drones and missiles from its littoral. Removing this ability will require the US to compel Iran, either through targeting the kill chain so that drones and missiles can be struck before they are fired, or by putting boots on the ground, or through regime change.

The US, as the historical proponent of Freedom of Navigation, is no longer as dominant at sea as it once was. Its Navy has shrunk from nearly 7,000 ships at the end of WW II and 600 ships at the end of the Cold War to around 292 now. These ships are overstretched by operations throughout the world – USS Gerald Ford has already been deployed for a record number of days, and looks nowhere near being able to return home in the next 2-3 months. This in turn has led to severe wear and tear on both the ship and its aircraft, in an environment of serious maintenance backlogs. Concurrently, the US shipbuilding industry has been severely degraded and is unable to either build sufficient ships fast enough or maintain them to fulfil current requirements. Moreover, the spread of lethal technologies like drones and ballistic missiles, to which cost-effective counters are still under development, limits the ability of the USN to operate in confined seas.

Despite not being a signatory to UNCLOS, the US has long demonstrated its unshakable commitment to Freedom of Navigation and maintained a FONOP programme to safeguard its interests and demonstrate its non-acquiescence to excessive maritime claims by coastal states⁷. This commitment is undergoing its severest test due to Iran's closure of the Straits of Hormuz. If the US can successfully open the Strait, it will be deemed to have won the war and will not only be able to dictate terms to Iran, but also to ensure that its supremacy and Freedom of Navigation remain alive for the near future. If, on the other hand, Iran can continue dictating who uses the Strait and who does not, the US will prove its military might cannot fix the situation and will have effectively lost the war. Such a loss will severely impact its credibility as a global super power and security partner. The consequences for the US

⁷ US Department of Defense Freedom of Navigation Program Fact Sheet, March 2015, [https://policy.defense.gov/Portals/11/Documents/gsa/cwmd/DoD%20FON%20Program%20--%20Fact%20Sheet%20\(March%202015\).pdf](https://policy.defense.gov/Portals/11/Documents/gsa/cwmd/DoD%20FON%20Program%20--%20Fact%20Sheet%20(March%202015).pdf)

could be similar to the consequences of losing control over the Suez Canal in 1956 for Great Britain: the end of its era as the dominant global power.

Where does India stand? India strongly supports Freedom of Navigation and it is in its interest to do so, notwithstanding contradictions between its MZI Act of 1976 and UNCLOS 1992⁸. But India does not possess either the technological or military strength to ensure freedom of the seas even for its own trade. India must prepare for an era in which Freedom of Navigation can no longer be taken for granted and is ensured either through effective diplomacy, or through the use of military power, to ensure that the sea lanes on which its rise depends remain open.

The efficacy of any law, whether international or domestic, depends on the harnessing of sufficient power to enforce it when necessary. In the final analysis, the result of the ongoing war and indeed the future of the global order will be decided by whether the US can enforce the freedom of the commons in the seas surrounding the Arabian Peninsula or not. A negotiated solution will only prove to other revisionist nations the limits of US enforcement, setting the stage for further challenges to freedom of navigation in the years ahead. India needs to be prepared for such a scenario by reinforcing all components of its maritime power.

⁸ See footnotes 2 & 3 for these contradictions.



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