

Commentary

From the Arctic to the Gulf: The Contested Geopolitics of Chokepoints

Klaus Dodds

Chokepoints have become an increasingly important topic in international affairs discourse. Edward Fishman wrote recently about financial and economic chokepoints and how oil pricing mechanisms, tanker fleets, and maritime insurance markets enable the United States (US) and other actors to target major petro-states like Russia and Iran. However, as recent events have demonstrated, shadow fleets continue to operate, and Western countries are bearing the brunt of rising diesel and liquified natural gas (LNG) prices. Primary drivers of this inflationary pressure are disruptions to shipping through the Strait of Hormuz and low gas storage levels in Europe; the cumulative impact of the full-scale Russian invasion of Ukraine and enduring conflict and disruption should not be underestimated either.

Maritime chokepoints were the subject of my recent talk at Fiker Institute. These chokepoints are significant because they are naturally occurring straits or man-made canals that squeeze high volumes of global shipping traffic into tight corridors. Their importance varies in terms of shipping volume and commodity flows, but some of the most notable are the Strait of Malacca, the Suez Canal, the Strait of Hormuz, and the Bab el-Mandeb Strait. Chokepoints garner less attention as such when their function as transport corridors is unimpeded, and ships can carry their trade through them in a reliable, safe, and secure manner. When this normal function is jeopardized, the economic and geopolitical stakes rise accordingly. Insurance premiums increase and the risk of direct and indirect action on shipping also sharpens.

Current geopolitical instability is affecting maritime chokepoints in various ways. The Bear Gap – a body of water between the Norwegian archipelago Svalbard and the Norwegian and Russian mainlands – is a site of geopolitical tension between the North Atlantic Treaty Organization (NATO) and the Russian Federation. Both sides are conducting military exercises and training missions designed to test readiness and resilience. Connecting the Barents and Norwegian Seas, the Bear Gap also serves as the primary maritime passage for Russia to maneuver its warships and nuclear-armed submarines out toward the North Atlantic region. Russia additionally seeks to protect its nuclear-armed Northern Fleet while ensuring that the Northern Sea Route (NSR) – a transport corridor linking Europe to Asia – remains open for business. Indeed, the shadow fleet that is transporting Russian oil to Asian and Middle Eastern markets uses the NSR, as do Asian shipping companies.

The Strait of Hormuz and Bab el-Mandeb Strait are the primary maritime chokepoints in and around the Arabian Peninsula. The former supports shipping trade and carries roughly 25% of the world's total seaborne petroleum and LNG. Asian markets are particularly dependent on Gulf energy exports, with China purchasing around 90% of Iranian oil. The last six months have witnessed unprecedented disruption to this chokepoint. On the other side of the Peninsula, Houthi rebels have demonstrated how

asymmetric warfare can be deployed. The Bab el-Mandeb Strait is the southern gateway to the Suez Canal, yet after the recent Houthi-induced disruptions to its normal functioning, shipping operators might opt to divert by traveling around the southern tip of Africa (despite the extra fuel this requires). Chokepoints have also reported a rise in GPS spoofing, which means that Global Navigation Satellite System (GNSS) signals are compromised and thus pose a risk to navigational resilience. In the absence of trusted location information, shipping becomes inevitably riskier.

Chokepoints will retain their geopolitical importance in the coming months. President Trump's quest for Western Hemispheric dominance has entailed the application of US pressure on Panama's government and its management of the Panama Canal, in addition to the cultivation of closer relations with Argentina in light of the country's proximity to the Drake Passage. Trump's desire to take control of Greenland is also rooted in concerns about Chinese and Russian shipping activity off the North American continent. Outside the US sphere of influence, actors ranging from Iranian forces to Houthi rebels and Somali pirates continue to demonstrate how land-based dominance in and around chokepoints – as well as rapid force projection by drones, mines, missiles, and small boats – can inflict costs and damage to those relying on passage through them. Western military and commercial shipping can quickly become expensive and highly vulnerable as a result.

Addressing the steep risks surrounding chokepoints will not be a straightforward task. While commercial shipping can be diverted and bypass both chokepoints of the Arabian Peninsula (albeit at an expense), in the long term, this might benefit Russia, which is eager to market the NSR as a safer transport corridor. Land-based corridors and infrastructure could be expanded upon, but as the Houthis have recently demonstrated, pipelines and airports can be targeted from afar. Safeguarding chokepoints requires defense collaboration with relevant coastal states such as Indonesia or uneasy accommodation with third parties who are not allies. European governments are increasingly recognizing the need to rapidly enhance supply chain resilience by locating alternative fuel sources alongside consolidating strategic stockpiles. Britain has held talks with European commissioners and allies (including Germany and France) regarding potential coordination on regional diesel reserves.

None of these imperatives absolve many navies of their current need to invest in underwater autonomous capability to detect and deter adversaries that wish to compromise shipping lanes, sub-sea infrastructure, and maritime chokepoints. In a world shaped by these maritime chokepoints, it is unsurprising that governments and non-state actors seek either relief or extort strategic advantage from these bottlenecks.

About the Author



Klaus Dodds is Professor of Geopolitics at Middlesex University London and Faculty Dean of Science and Technology. He is also Senior Research Fellow at RAND Europe and the author of many books. He has also served as a specialist adviser to several UK parliamentary select committees, including the House of Lords Select Committee on the Arctic. He has worked with NATO's Strategic Foresight Analysis group and has also provided expert advice to the European Parliament's Foreign Affairs Committee, amongst other international bodies and companies.

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October 2026

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