



Chokepoint Hormuz

Epic Fury and Italy's Mediterranean strategy

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Introduction

The Strait of Hormuz is, by any measure, the most consequential chokepoint in the global economy. Barely thirty kilometres wide at its narrowest point, it connects the Persian Gulf to the Gulf of Oman and, beyond, to the Indian Ocean, channelling daily roughly one-fifth of the world's oil and one-quarter of its liquefied natural gas through two shipping lanes each no wider than three kilometres.¹ For decades, this slender corridor has served as the vital artery of international energy trade, and treated as a given of the global order.

That assumption ended on 28 February 2026, when the joint US–Israeli operation Epic Fury was launched against Iranian territory. What had been conceived as a surgical strike to decapitate the regime and neutralise Iran's nuclear programme rapidly deteriorated into a high-intensity conflict without clearly defined political objectives or a credible exit strategy. As one analyst observed, the operation represents "a paradigmatic case of strategic overextension", in which initial tactical enthusiasm has collided with the ruthless logic of long-term strategy, producing repercussions for the Gulf's security architecture — and for the balance of power among great powers — that may prove irreversible.²

For Italy, the crisis is anything but a distant emergency. A nation historically bound to the sea and dependent on imports for more than 75% of its energy needs, Italy faces in Hormuz a direct challenge to its energy sovereignty, economic resilience and strategic credibility. These stakes are best understood through the lens of the Wider Mediterranean — defined as the Italian M.O.T. (Maritime Operational Theatre) of primary national interest, encompassing all countries towards

¹ Oliva P.B., "Perché si parla dello Stretto di Hormuz," *DIRE*, National News Agency, 15 June 2025, <https://www.dire.it/15-06-2025/1159292-perche-tutti-parlano-dello-stretto-di-hormuz-cosa-succede-davvero-e-cosa-rischia-il-mondo/>.

² Evangelisti A., "Operation Epic Fury e l'overstretch americano: quando la guerra lampo diventa palude strategica," *Geopolitica.info*, 13 March 2026, <https://geopolitica.info/operation-epic-fury-e-loverstretch-americano-quando-la-guerra-lampo-diventa-palude-strategica/>.

which Italy pursues a unified and independent security strategy, as well as areas of concern to NATO and the European Union.³ This concept has evolved over time from a strictly geographic definition into a broader geo-strategic vision that accounts for Italy's interactions with Europe, Asia and Africa. At its core lies the notion of strategic depth: the capacity to project influence beyond maritime borders as a precondition for national security and prosperity.⁴

It is in this framework that the closure of Hormuz must be read — not as a regional crisis to be observed from a safe distance, but as a challenge that "*cannot be delegated to others*."⁵ This essay traces the evolution of the conflict, assesses its geopolitical and operational consequences, and highlights Italy's maritime vulnerabilities, which, if left unaddressed, could lead to the loss of its relevance in the Mediterranean.

A summary of facts. Asymmetric warfare in the strait of Hormuz.

The conflict began on 28 February 2026 with joint US–Israeli strikes against Iranian territory under Operation Epic Fury, unleashing a systemic crisis whose epicentre was the Strait of Hormuz — the narrow waterway through which one-fifth of the world's oil and nearly a third of its liquefied natural gas flow daily.⁶

Tehran's response was not conventional. Within hours, the Islamic Revolutionary Guard Corps Navy activated a well-rehearsed interdiction ecosystem: fast attack craft of the so-called Mosquito Fleet, swarms of aerial and surface drones, and a mine arsenal estimated at between 2,000 and 6,000 warheads, including Chinese-origin rocket-propelled devices with acoustic and magnetic triggers. Systematic GPS jamming erased AIS tracking signals across the Strait, creating a blind theatre in which nearly one million interferences were recorded in the first quarter of 2026 alone. Even before the first clashes erupted, insurance markets and logistical calculations were already paralysed.⁷

The escalation unfolded rapidly. A US destroyer intercepted an Iranian cargo vessel, opening fire after hours of unanswered warnings and allowing Marines to board and seize it.⁸ Tehran labelled the action armed piracy, negotiations in Islamabad collapsed, and Brent crude surged to nearly \$97 a barrel. The IMO estimated that 800 ships were soon trapped in the Gulf, with over 20,000 seafarers stranded aboard. Pasdaran gunboats fired on transiting merchant vessels, and two container ships — operated by an Italian–Swiss group with a turnover close to €90 billion — were seized outright.

³ Various Authors, *CESMAR 004, L'Italia e la marittimità: evoluzione strategico-dottrinarina*, Pathos Ed, Turin, 2023, p. 316.

⁴ CESMAR Editorial Staff, "Il Mediterraneo allargato: una visione strategica per l'Italia," *Cesmar.it*, Bussola no. 43, February 2025, <https://cesmar.it/wp-content/uploads/2025/02/BUSSOLA-NR-43-MEDITERRANEO-ALLARGATO.pdf>.

⁵ Domini R., "L'ammiraglio Roberto Domini: per l'Italia intervenire a Hormuz è questione di interesse nazionale," *InsideOver*, 28 April 2026, <https://it.insideover.com/guerra/lammiraglio-roberto-domini-per-litalia-intervenire-a-hormuz-e-questione-di-interesse-nazionale.html>.

⁶ OHIMag Editorial Staff, "OHIMag daily global maritime geopolitical forecast," 5 May 2026, <https://www.ohimag.com/sintesi-giornaliera-di-geopolitica-e-relazioni-internazionali/sintesi-giornaliera-del-5-maggio-2026>.

⁷ Molteni M., "Hormuz: tempesta sullo stretto," *AnalisiDifesa*, 14 March 2026, <https://www.analisdifesa.it/2026/03/hormuz-tempesta-sullo-stretto/>.

⁸ Fabey M., "Iran conflict 2026: US destroyer disables Iranian cargo ship to enforce blockade," *Janes*, 20 April 2026, <https://www.janes.com/defence-intelligence-insights/defence-news/weapons/iran-conflict-2026-us-destroyer-disables-iranian-cargo-ship-to-enforce-blockade>.

Washington then attempted to force the passage with Operation Project Freedom, deploying destroyers, aircraft and thousands of personnel to escort commercial shipping through the Strait. Only two US-flagged vessels completed the transit before Iran retaliated with missiles against a South Korean ship and drone strikes on the Emirati port of Fujairah.¹⁰ Within two days the operation was suspended, its failure acknowledged. Iran's parliament president declared that Tehran had not even begun to fight; the foreign minister dismissed the entire American effort as Project Deadlock. Negotiations mediated by Pakistan, Oman and Russia remained deadlocked, though Iran had earlier put forward a 14-point roadmap offering a gradual reopening of the Strait in exchange for a fifteen-year freeze on uranium enrichment — a proposal Washington received with caution.¹¹

By early May the toll was stark: 32 verified incidents, at least ten sailors dead, over 500 million barrels withheld from global markets, and an estimated cost of \$72 billion in the first sixty days. IEA strategic reserves covered barely 21% of the physical deficit and risked technical depletion by June. Europe alone absorbed losses exceeding €27 billion — roughly €500 million per day — as gas prices doubled and Brent reached \$112 a barrel. The Suez Canal registered a 48% collapse in traffic, and war risk insurance premiums tripled, adding \$250,000 to every supertanker voyage.¹²

After 38 days of operations, the CENTCOM commander testified before the US Senate that Epic Fury had destroyed or severely degraded more than 85% of Iran's military-industrial base for missiles, drones and naval defence, eliminating 161 naval units. Yet Iran retained what he termed a disruption capability — fast boats, drones, mines and proxy networks — sufficient to keep risk levels in the Strait dangerously elevated. A forty-nation coalition led by the United Kingdom maintained patrols under Operation Sentinel, while the Trump–Xi summit in Beijing produced agreement on keeping Hormuz open but no structural breakthrough, with China preserving its characteristic pragmatic neutrality.¹³

Looking ahead, analysts caution that Iran's leverage may prove less decisive than it appears: a prolonged blockade ultimately damages Tehran as much as its adversaries, creating space for negotiation. Even so, any physical normalisation of energy markets would require six to twelve months after an agreement. The broader risk is systemic — the Iranian precedent may embolden other coastal states to impose control over strategic waterways, steadily eroding the freedom of navigation on which the global economy depends.¹⁴

⁹ Boccellato P., “Stretto di Hormuz, l'Iran sequestra due navi MSC. C'entra lo spoofing?,” *CyberSecurity Italia*, 26 April 2026, <https://www.cybersecitalia.it/stretto-di-hormuz-liran-sequestra-due-navi-msc-centra-lo-spoofing/63478/>.

¹⁰ OHIMag Editorial Staff, “OHIMag daily global maritime geopolitical forecast,” *ohimag.com*, 7 May 2026, <https://www.ohimag.com/sintesi-giornaliera-di-geopolitica-e-relazioni-internazionali/sintesi-giornaliera-del-7-maggio-2026>.

¹¹ *Ibidem*.

¹² OHIMag Editorial Staff, “OHIMag daily global maritime geopolitical forecast,” *ohimag.com*, 12 May 2026, <https://www.ohimag.com/sintesi-giornaliera-di-geopolitica-e-relazioni-internazionali/sintesi-giornaliera-del-12-maggio-2026>.

¹³ HIMag Editorial Staff, “OHIMag daily global maritime geopolitical forecast,” *ohimag.com*, 15 May 2026, <https://www.ohimag.com/sintesi-giornaliera-di-geopolitica-e-relazioni-internazionali/sintesi-giornaliera-del-15-maggio-2026>.

¹⁴ OHIMag Editorial Staff, “OHIMag daily global maritime geopolitical forecast,” *ohimag.com*, 18 May 2026, <https://www.ohimag.com/sintesi-giornaliera-di-geopolitica-e-relazioni-internazionali/sintesi-giornaliera-del-18-maggio-2026>.

Geopolitical and strategic consequences

Hormuz is not a regional crisis theatre, but the laboratory where the grammar of maritime power is being rewritten. The Iranian doctrine of sea denial, perfected over forty years of A2/AD (Anti-Access/Area Denial) planning, has demonstrated an uncomfortable truth: in such a narrow corridor, a mid-tier actor can deny freedom of manoeuvre to the world's most powerful navy, not by seeking physical control of the waters, but by making transit economically unsustainable. The keystone is the asymmetric cost ratio. Each Shahed drone, valued at between \$20,000 and \$50,000, has required the use of a PAC-3 missile interceptor costing approximately four million dollars: an exchange ratio of 130 to 1 that has bled American stockpiles dry. In forty days, the Pentagon has expended 1,100 JASSM missiles, 1,000 Tomahawks, 1,200 Patriots and 1,000 ATACMS, incurring an expenditure of between \$28 and \$35 billion. Replenishing these arsenals will take at least six years.¹⁵

On a geopolitical level, the conflict has accelerated the transition from a unipolar order to a conflictual and fragmented multipolarity. Washington has discovered the limits of its own power projection: the naval blockade against Iranian ports has strangled global energy trade without breaking Tehran, while Russia has exploited the American distraction to tighten its grip on Europe, blocking the transit of Kazakh oil to Germany via the Druzhba pipeline since 1 May and positioning itself as an indispensable mediator.¹⁶ China, which absorbs 80–90% of Iranian oil exports, has practised a calculated ambiguity: without openly violating the blockade, it has contested its legitimacy and pressed for the reopening of the Strait.¹⁷ The Gulf monarchies, led by Saudi Arabia and Kuwait, have denied the use of their bases for “Project Freedom”, fearing retaliation against their energy infrastructure; on 28 April, the United Arab Emirates announced its withdrawal from OPEC after 58 years. The post-war alliance architecture is showing structural cracks that no tactical move will be able to heal in the short term.¹⁸

Europe, for its part, has launched strategic ambitions but has clashed with its own operational fragmentation. The Franco-British proposal for a multinational mission with alternating command, discussed at Northwood on 27 April with over thirty countries, long remained devoid of concrete commitments. RUSI has calculated that a close blockade of Iranian ports would require approximately one hundred naval vessels to maintain twenty-two on station¹⁹: a critical mass that

¹⁵ Scott O., “US has ‘burned through’ billions of dollars’ worth of critical weapons supplies in the Iran war, report claims,” *Independent*, 24 April 2026, <https://ca.news.yahoo.com/us-burned-billions-dollars-worth-084420530.html>.

¹⁶ Bryanski G., “Exclusive–Russia to halt Kazakhstan’s oil flows to Germany via Druzhba, sources say,” *Internazionale*, 21 April 2026, <https://www.internazionale.it/ultime-notizie-reuters/2026/04/21/exclusive-russia-to-halt-kazakhstan-s-oil-flows-to-germany-via-druzhba-sources-say-2>.

¹⁷ Rampini F., “La Cina e il grande trucco delle «raffinerie indipendenti» con cui sfida gli Usa: «Sul petrolio iraniano sanzioni senza valore»,” *Corriere della Sera*, 4 May 2026, https://www.corriere.it/oriente-occidente-federico-rampini/26_maggio_04/gioco-cina-petrolio-iraniano-113275f8-fe6d-4c5f-8302-a8dd59bddxik.shtml.

¹⁸ Schneider F., “The UAE’s OPEC Exit Leaves the Gulf Further Adrift,” *Middle East Council on Global Affairs*, 5 May 2026, https://mecouncil.org/blog_posts/the-uaes-opec-exit-leaves-the-gulf-further-adrift/.

¹⁹ idharth Kaushal and Dan Marks, “The US Blockade of Hormuz: Who Holds the Advantage?,” *RUSI*, 5 May 2026, <https://www.rusi.org/explore-our-research/publications/commentary/us-blockade-hormuz-who-holds-advantage>.

European navies, taken individually, do not possess.²⁰

Furthermore, the crisis has unveiled a hybrid dimension that transcends the strictly maritime domain. Italy has already experienced an event of this kind in one of its ports. The explosion of the oil tanker *Seajewel* in the port of Vado Ligure during the night between 14 and 15 February 2025, attributed to TNT devices equipped with magnets and timers of probable Ukrainian origin (an act of hybrid warfare linked to the Russian-Ukrainian conflict), has demonstrated that European energy terminals are already the target of clandestine operations tied to hybrid warfare and the interdiction of the pro-Russian shadow fleet. The event highlights the vulnerability of Italian energy terminals, which now simultaneously face local physical threats and the blockade of global routes due to US-Iran tensions.²¹

Italy's Mediterranean strategy. Imperatives for a maritime nation

The Hormuz crisis has forced Italy to confront a structural truth long obscured by institutional inertia: a nation surrounded by the sea on three sides, importing more than 75% of its energy and whose prosperity depends on the free flow of global trade, cannot afford a passive maritime posture. The closure of the Strait has been, in this sense, the most severe stress test of Italy's energy and maritime model since 1973.

The immediate consequences were stark. The blockade severed supplies of Qatari LNG — accounting for 10 to 12% of national imports, approximately 6.4 billion cubic metres annually — after QatarEnergy declared force majeure.²² The IMF revised Italy's growth forecast down to 0.4%, the worst figure in Europe, while energy surcharges have already cost households roughly one thousand euros each. Alternative routes have struggled to absorb the shock: urgent transit auctions at the Panama Canal surged by 185%, and only the TAP corridor from Azerbaijan — covering 16% of national gas supply — provided a degree of structural resilience. New pipelines towards the Red Sea and the IMEC corridor are being planned to bypass the bottleneck permanently, but their realisation lies years away.²³

Yet the crisis has also revealed an unexpected competitive advantage. Italy's Marina Militare possesses some of the most advanced Mine Countermeasures capabilities within NATO. Its fleet of eight Gaeta-class minehunters — built from non-magnetic fibreglass and equipped with multi-frequency VDS sonars, ROVs and autonomous marine drone integration — clears approximately 14,000 explosive devices annually.²⁴ This expertise is grounded in an operational pedigree

²⁰ Kyriakidis E., "Naval blockade vs. maritime interdiction operation," *Strategy International*, 8 May 2026, <https://strategyinternational.org/2026/05/08/publication265/>.

²¹ Del Frate C., "Seajewel, per l'esplosione sulla petroliera aperta a Genova inchiesta per terrorismo. Cosa sappiamo," *Corriere della Sera*, 19 February 2025, https://www.corriere.it/cronache/25_febbraio_19/seajewel-per-l-esplosione-sulla-petroliera-aperta-a-genova-inchiesta-per-terrorismo-3ceee634-327d-43fc-9539-5fa800899xik.shtml.

²² Various Authors, "QatarEnergy extends force majeure until mid-June 2026," *Edison*, 27 March 2026, <https://www.edison.it/en/qatarenergy-extends-force-majeure-until-mid-june-2026>.

²³ Various Authors, "Scenari geopolitici Ohimag," *cesmar.it*, 20 April 2026, <https://cesmar.it/scenari-geopolitici-26/>.

²⁴ Vianello M., "L'ammiraglio Vianello: così i cacciamine italiani possono liberare lo Stretto di Hormuz," *InsideOver*, 2 May 2026, <https://it.insideover.com/guerra/lammiraglio-vianello-cosi-i-cacciamine-italiani-possono-liberare-lo-stretto-di->

stretching back to the Gulf 1 mission of 1987–1988, the first international minesweeping campaign ever conducted in the Strait of Hormuz. «No European ally combines equivalent technical proficiency with Italy's historical neutrality in the Gulf and its open diplomatic channels with Tehran, Moscow, Beijing, New Delhi and Tokyo. Washington has explicitly recognised this, urging Rome to join clearance operations as a perhaps irreplaceable contributor. The operational plan foresees the deployment of four vessels — minehunters *Crotone* and *Rimini*, a *Bergamini*-class frigate and a logistics support ship — deployable within four weeks from *La Spezia*. The €1.6 billion CNG programme will guarantee twelve next-generation platforms and sustain this primacy beyond 2035.»²⁵

The legal dimension reinforces Italy's claim to lead or co-lead the mission. As legal scholar Fabio Caffio has clarified, a bilateral US–Iran agreement is insufficient for a strait classified as common waters under UNCLOS: any minesweeping operation requires either Omani authorisation or a UN Security Council mandate.²⁶ A mission commanded by Italy — a nation that has conducted no offensive operations against Iran — is structurally more acceptable to Tehran than any US-led alternative.²⁷

The deeper lesson, however, is doctrinal. Post-Hormuz, strategic influence no longer derives from controlling vast oceanic expanses but from governing the nodes through which global flows converge: chokepoints, LNG terminals, and the subsea data cables carrying 95% of world internet traffic. Italy must therefore update its national maritime doctrine, closing critical gaps in drone countermeasures, undersea warfare and the cyber-physical protection of offshore infrastructure. The concept of the Wider Mediterranean — Italy's primary maritime operational theatre, spanning the interactions between Europe, Africa and Asia — demands precisely this kind of strategic depth.²⁸

Investing in MCM platforms, counter-drone architectures and persistent subsea surveillance is not a budget choice. It is the precondition for Italy's autonomy, resilience and credibility as a Mediterranean power in the twenty-first century. Hormuz has made that imperative impossible to defer.

Conclusions

The Strait of Hormuz crisis, triggered by Operation 'Epic Fury' in February 2026, is not a mere cyclical episode destined to fade away: it is an indicator of structural transformations in the global maritime order that are redefining the strategic priorities of Italy and Europe as a whole.

On an operational level, the Iranian doctrine of sea denial has demonstrated an uncomfortable truth:

hormuz.html.

²⁵ Domini R., Op. cit.

²⁶ Caffio F., "Quale accordo per riaprire Hormuz. L'analisi di Caffio," *formiche.net*, 7 May 2026.

²⁷ Domini R., "Sminamento dello Stretto di Hormuz: perché l'Italia ha diritto al comando della missione," *InsideOver*, 5 May 2026, <https://it.insideover.com/guerra/sminamento-dello-stretto-di-hormuz-perche-litalia-ha-diritto-al-comando-della-missione.html>.

²⁸ CESMAR Editorial Staff, *Il Mediterraneo allargato: una visione strategica per l'Italia*, Bussola no. 43, February 2025, <https://cesmar.it/wp-content/uploads/2025/02/BUSSOLA-NR-43-MEDITERRANEO-ALLARGATO.pdf>.

a mid-tier actor, armed with low-cost drones, mines and electronic warfare, can render transit through the planet's most strategic strait economically unsustainable, eroding the arsenals of the world's most powerful navy at a cost ratio of 130 to 1. Freedom of navigation is no longer a given, but a hard-won achievement requiring specialised capabilities, diplomatic credibility and a constant presence.

On a geopolitical level, the crisis has accelerated the transition towards a conflictual and fragmented multipolarity. Washington has discovered the limits of its power projection; Europe has displayed strategic ambitions devoid of critical mass; whilst Russia and China have successfully exploited the vacuum to their advantage. In this scenario, Italy finds itself at a crossroads: passively endure the effects of the crisis—with costs already estimated in the billions of euros and a downward revision of economic growth—or assert an active role, founded upon concrete capabilities and a diplomatic credibility that no other Western actor can boast in equal measure.

The answer can only be the latter. Italy possesses the most advanced MCM capabilities within NATO, a history of neutrality in the Gulf dating back to the 1987–1988 mission, and open diplomatic channels with all key actors: Tehran, Moscow, Beijing and New Delhi. This unique combination of technical excellence, legal legitimacy and political credibility places Rome in a position not merely to participate, but to lead or co-lead the clearance mission in the Strait.

The most profound lesson of this crisis, however, is systemic in nature: energy security, digital sovereignty and economic prosperity now converge within a single domain—the sea—and the Navy (*Marina Militare*) is its indispensable custodian. Investing in a modern naval force, equipped with specialised personnel and advanced platforms, is not merely a defense budget choice: it is a strategic imperative for the survival and prosperity of the nation in the 21st century. Hormuz has made this an issue that can no longer be deferred.