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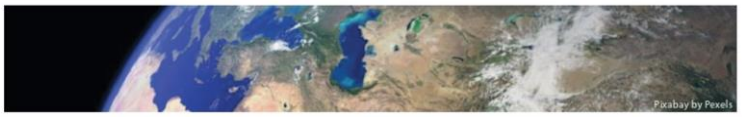

Geo-Blue: June 2026 – Part 1

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Introduction

The weeks between June 1st and June 18th, 2026, presented international analysts with a sequence of events of extraordinary strategic density.

- The Strait of Hormuz shifted from the brink of open war to a fragile diplomatic understanding.

- The Russia-Ukraine conflict continued its grueling hybrid escalation.
- Turkey consolidated its technological and military emancipation.
- China extended its maritime and infrastructural projection from the Indo-Pacific to Sub-Saharan Africa.

Against this backdrop, the post-war international order continues to dissolve into a multipolar system characterized by simultaneous, interconnected crises. This essay synthesizes the daily analyses produced by CESMAR and OHIMag, providing a unified overview of major geopolitical, strategic, and maritime developments, alongside specific consequences for Italy.

The Hormuz Crisis

The month of June 2026 opened with the Strait of Hormuz under maximum operational tension. In the opening days of the month, US military forces intercepted and disabled a commercial vessel suspected of violating Iranian sanctions, while Oman issued an alert regarding a floating mine in the strait's waters. The International Monetary Fund and the International Energy Agency issued formal warnings: disruptions to oil traffic were depleting global crude reserves at unprecedented rates, with approximately 20% of the world's oil supply blocked or diverted.

On June 3rd, the US Central Command (Centcom) conducted heavy airstrikes on the Iranian island of Qeshm. Tehran retaliated with missiles and drones against US bases in Kuwait and Bahrain; an Iranian drone struck Terminal 1 of Kuwait International Airport, causing one fatality. This marked the peak escalation of the crisis.

In parallel, while the formal operation "Project Freedom" was shelved, Centcom initiated an alternative, low-profile strategy: civilian vessels sailing close to the Omani coast with transponders turned off, discreetly escorted by US military units. Dozens of VLCC supertankers gathered outside the Gulf, betting on an imminent de-escalation.

The Diplomatic Turning Point

The diplomatic breakthrough matured slowly through Pakistani mediation before crystallizing into a Memorandum of Understanding signed on June 17–18, 2026. The 14-point Iranian draft outlines:

- The reopening of the Strait to commercial shipping.
- A verified freeze on certain uranium enrichment activities.
- The gradual lifting of economic sanctions.

However, the concessions to Tehran are substantial. They include immediate waivers for oil exports, the unfreezing of frozen funds estimated between $25 billion and $100 billion, the total lifting of sanctions, and a reconstruction plan worth at least $300 billion funded by Washington and regional partners. On the nuclear front, Iran freezes the status quo without dismantling its facilities or accepting specific IAEA inspections. Several CSIS analysts defined the agreement as an Iranian

diplomatic victory built upon a military defeat: Tehran secures economic lifeline oxygen without relinquishing its core strategic capabilities.

Even after the signing, navigation in Hormuz remained high-risk. New US directives define the southern route as permanently hazardous, as Pasdaran units continue electronic jamming of GPS systems, drone flyovers, and aggressive monitoring. Major container carriers—Maersk, MSC, CMA CGM, Hapag-Lloyd—continued to favor the Cape of Good Hope route. This is because the draft agreement recognizes the joint management of maritime services in the strait by Iran and Oman, including the authority to impose transit fees—a sovereign lever that transforms the reopening into a tactical truce rather than a structural solution.

The Russia-Ukraine Conflict

During the period examined, the Russia-Ukraine conflict went through a phase of persistent multi-domain escalation.

A Russian drone crossing into Romania in the opening days of June highlighted the danger of cross-border incidents, while Russia hinted at lowering its nuclear threshold—following the Karaganov strategic school—as a tool of psychological pressure. On June 5th, an out-of-control Ukrainian Magura V5 maritime drone exploded in the Romanian port of Constanța near ammonium nitrate depots. The episode demonstrated that Kyiv is conducting active military operations in the waters of a NATO member state, setting dangerous precedents regarding the geographical expansion of the conflict in the Black Sea.

Diplomatic and Strategic Moves

On the diplomatic front, President Zelensky sent an open letter to Putin, inviting him to a direct meeting and a total ceasefire for the duration of negotiations. Putin formally rejected the proposal, branding it Western propaganda, and issued a presidential decree ordering a massive increase in Russian Armed Forces personnel to their highest levels since the end of the Cold War. Moscow is aiming for exclusive superpower-to-superpower negotiations, bypassing Kyiv to renegotiate spheres of influence directly with Washington. Russian analyst Andrei Bezrukov outlined a "20-year conflict" doctrine founded on technological self-sufficiency, the consolidation of BRICS, and permanent industrial mobilization.

In this context:

- Ukrainian drones struck oil depots and logistical infrastructure deep within southern Russia.
- For the first time, Ukrainian naval drones attacked a Russian warship in the Baltic Sea (the corvette *RFS Boiky* at Kronstadt), stripping the Kremlin's fleet of the illusion of a safe theater.
- On the technological front, the CSIS clarified that software—not physical platforms—determines superiority in future conflicts. Ukrainian drones achieved the capability to operate in a fully autonomous mode, removing human operators from the decision-making loop and

raising ethical and legal questions regarding international humanitarian law.

Cognitive warfare continues to parallel kinetic warfare. The publication of a photo showing Ukrainian students arranged in the shape of a swastika—later attributed to a Russian fabrication but debunked by facts—illustrated how truth is frequently blurred by disinformation and propaganda.

Turkey and Global Balances

While Hormuz and Ukraine dominated the headlines, other structural processes quietly reshaped the global balance of power.

Turkey achieved a qualitative leap in its strategic autonomy by ordering its first 20 fifth-generation TAI Kaan stealth fighters, drastically reducing its technological dependence on the United States. Simultaneously, Ankara consolidated its "Blue Homeland" (*Mavi Vatan*) doctrine, extending its jurisdictional claims in the Eastern Mediterranean and developing autonomous weapons systems like the Kilic underwater kamikaze drone, presented by Aselsan. Its pragmatic rapprochement with Saudi Arabia has created a flexible Sunni bloc oriented toward regional stability, capable of engaging with both NATO and Russia from a position of strength.

East Asia and Western Cracks

In East Asia, the designation of the *USS Theodore Roosevelt* as the flagship for RIMPAC 2026 and the confirmation of the AUKUS nuclear submarine base in the Indo-Pacific by 2027 signaled American determination to physically garrison the quadrant. Beijing responded by:

- Intensifying patrols around Scarborough Shoal.
- Conducting exercises that go beyond a classic amphibious landing on Taiwan—integrating naval blockades, cyberattacks, and missile interdiction into an A2/AD strategy.
- Launching a mysterious submarine in Shanghai, largely devoid of a traditional sail and potentially featuring advanced nuclear propulsion.

Meanwhile, Xi Jinping's visit to Pyongyang transformed North Korea into a testing ground for Chinese diplomatic leverage in the Indo-Pacific.

Against the backdrop of these dynamics, the Islamabad Declaration and the subsequent US-Iran Memorandum revealed the paradox of the "Colby Doctrine": the US strategic pivot to the Indo-Pacific has been disrupted by Middle Eastern realities, proving the impossibility of isolating oneself from interconnected geopolitical theaters.

The G7 summit in Évian exposed cracks in Western leadership. While Trump urged Putin toward a territorial agreement with Zelensky, the Euro-Atlantic bloc can no longer diplomatically isolate Russia or dictate the global economic agenda, pinned between the rise of the BRICS and the growing weight of the Global South.

Technology and Economics

The period under review saw an accelerated transition toward new technological paradigms in both military and economic spheres.

The Pentagon allocated up to **$55 billion** through Task Force 401 for autonomous and anti-drone systems. Concurrently, the Senate Armed Services Committee (SASC) mandated the parallel development of the next-generation DDG(X) destroyer alongside a new class of nuclear-powered heavy surface combatants, informally dubbed the "Trump Battleship." These programs respond directly to the numerical superiority of the Chinese navy—Beijing controls **53.3%** of global shipbuilding output compared to the United States' **0.1%**—and a widening gap in naval construction and maintenance capacity.

The Seabed Warfare Front

The submarine cable war emerged as an invisible front of extraordinary strategic relevance. Authors note that 44 incidents were recorded in the Baltic Sea alone between 2024 and 2025, including sabotage and hostile maneuvers attributed to Russia and China via ambiguous tactics such as anchor-dragging. Submarine cables—the backbone of global data traffic—have become hybrid targets struck by explosive devices, anchors, and fishing nets.

NATO and the AUKUS alliance are promoting an integrated deterrence strategy:

- Seabed patrolling using underwater drones.
- Public-private cooperation.
- Updating legal frameworks and reducing repair timelines.

The war over "frozen assets" analyzed by CIMSEC completed the picture of new asymmetric conflict styles. During the Hormuz crisis, roughly 140 million barrels of oil and 1,600 ships were stranded in the Gulf without insurance coverage, demonstrating that global supply chains can be paralyzed without firing a single shot.

On the techno-industrial front, the Trump administration classified artificial intelligence models as dual-use strategic assets for national security, imposing strict restrictions on foreign investment in Anthropic. This decision seals AI's definitive transition from a commercial product to an instrument of technological sovereignty, launching a new cycle of algorithmic control polarization between the Western bloc and the Sino-Russian bloc.

Parallel to this, "China Shock 2.0"—the massive export of subsidized Chinese green technologies—forced the EU to adopt protective tariff measures. Meanwhile, the "critical minerals trap" in directed-energy weapons (with neodymium, gallium, and germanium firmly in Chinese hands) highlights a structural paradox: the West depends economically on its primary geopolitical adversary to develop the weapons meant to counter it.

Geopolitical Consequences

The analyzed period accelerated the dissolution of the international order founded on Western primacy, replacing it with a multipolar system of mutually reinforcing regional crises. The Hormuz crisis did not remain a bilateral US-Iran standoff; it proved to be the nexus around which global alliances and alignments reorganized.

- China consolidated alternative routes through Pakistan by signing billion-dollar agreements to upgrade the port of Gwadar under the CPEC framework.
- India responded by upgrading infrastructure in Great Nicobar, overlooking the Strait of Malacca.
- Washington maintained a posture of maximum pressure that struggled to translate into a coherent long-term strategy, as highlighted by the paradox of Congress passing a bipartisan resolution to limit unilateral military action against Iran at the exact moment of peak tension.

The US-Iran Memorandum redistributed strategic weight in the Middle East far beyond the nuclear issue. Washington is reducing its direct power projection in the region to concentrate resources on containing China, while Tehran receives implicit recognition of a growing hegemonic role. Gulf monarchies are re-evaluating their reliance on American protection, accelerating autonomous strategic thinking; the proposal to establish a *Persian Gulf Strait Authority* signals an attempt to reconfigure regional balance via multilateral mechanisms that diminish Western presence. Israel reacted by intensifying bombardments in Lebanon, exercising a de facto unilateral veto over the emerging diplomatic architecture and deepening its strategic rift with Washington.

In Europe, the progressive American disengagement from continental defense—accelerated by the Trump administration—leaves a security vacuum of historic proportions. The G7 confirmed support for Ukraine but struggled to translate rhetorical cohesion into shared legal instruments for utilizing frozen Russian assets. Bulgaria halted weapons supplies to Kyiv, creating a significant crack in the European front. Macron's initiative for an extended European nuclear deterrence, backed by nine allies including Germany and Greece, proposes a new pillar for continental security but remains exposed to French domestic political fragility. EU internal fragmentation—strained by divisions over the Lebanese crisis, the costs of Ukrainian accession, and political instability in Spain and Germany—makes this transition extraordinarily difficult.

In the South Caucasus, Pashinyan's electoral victory in Armenia marked a structural shift in regional security architecture: Yerevan is moving away from the CSTO orbit, creating vacuums that China and Turkey may look to fill, while Moscow fears a loss of credibility as a post-Soviet security guarantor. The Sahel confirmed its role as a proxy battlefield: jihadist militias are strengthening in Mali and Niger, the Russian Africa Corps is consolidating its presence, and Ukrainian special forces are now active in the region. Finally, Sudan, with fighting nearing Port Sudan, brings civil war to the doorstep of the Red Sea. The emerging multipolar world is not more stable; it is a system where regional conflicts feed into each other and can explode unpredictably.

Strategic Consequences

On the military and doctrinal front, the period accelerated the transition toward new warfare paradigms redefining global defense architectures. Drones have become the dominant technological battlefield. While the Pentagon pours tens of billions into autonomous and anti-drone systems, Kyiv demonstrated the capability to strike infrastructure deep inside Russian territory and project maritime drones all the way to the Baltic Fleet. The tactical maturity achieved by uncrewed systems creates a strategic paradox: drones structurally prolong conflicts, paradoxically preventing decisive resolutions and favoring wars of attrition.

The space domain has become a new front for direct confrontation. Four Russian military satellites, launched in April 2026, executed complex orbital maneuvers to position themselves close to the ICEYE-X36 commercial radar satellite (purchased via Ukrainian crowdfunding), validating Moscow's warnings that private commercial infrastructure used for wartime purposes constitutes a legitimate military target. The clash has shifted to Low Earth Orbit (LEO), adding an operational dimension to hybrid conflict. Cognitive warfare—analyzed by the CSIS as the true contemporary battlefield—demands narrative and information ecosystem defense capabilities that Western democracies still struggle to structure institutionally.

Operation "Midnight Hammer" and its doctrinal analysis by RUSI highlighted how AI is redefining military command. Automated systems accelerate reaction times and battlefield information management, but they do not replace a commander's intuition. The risk of information overload in high-intensity conflicts requires commanders to deeply understand AI's limitations to prevent automation from turning from a tactical asset into a strategic vulnerability. Meanwhile, the downing of a US F-15E by a suspected Chinese missile in Iranian hands signaled a Sino-Iranian technological transfer with profound repercussions on the balance of weapons systems.

Naval Deterrence Evolution

On the naval deterrence front, the US SASC mandated the parallel development of the DDG(X)—equipped with active electronically scanned array radars and directed-energy weapons—and a new heavy nuclear-powered platform. These programs respond to the Chinese navy's growing numerical superiority in the Western Pacific.

Program/Alliance	Core Focus
AUKUS Partnership	Expanded scope to autonomous underwater drones for ocean floor surveillance, launching an "invisible war" against Chinese and Russian submarine capabilities.
Pentagon RIMES Program	Long-range stealth attack drones to complete the technological trajectory of US forces in systemic competition with Beijing.

The Chinese launch of a sail-less submarine in Shanghai—a qualitative leap in underwater

innovation—severely tests Western tracking capabilities and accelerates the urgency for an industrial response.

The progressive erosion of arms control treaties, combined with the parallel modernization of Russian, Chinese, and US arsenals and the proliferation of dual-use technologies, increases the likelihood of strategic miscalculations. The IISS report on the erosion of the global nuclear order, aggravated by the opaque expansion of China's arsenal, outlines a context where strategic predictability is reduced for all actors. The operational readiness crisis of the F-35 fleet—largely grounded due to maintenance issues—undermines the credibility of US aerial deterrence at a time of maximum tension. The Western defense industrial base shows structural cracks: the Pentagon struggles to simultaneously sustain the Pacific line and support Ukraine, with shipyards under pressure and facing a shortage of skilled labor.

Maritime Consequences

The maritime dimension served as the common thread throughout the entire period, with simultaneous tensions across five theaters: the Persian Gulf, the Black Sea, the Indian Ocean, the South China Sea, and the Arctic. Their interconnectedness produced systemic effects across the international commercial and security order, confirming that control over maritime chokepoints remains the primary arena for great power competition.

The Strait of Hormuz was the point of maximum pressure on the international economic order. During the opening weeks of the month, the combination of Iranian drone and missile attacks, the deployment of naval mines by the Pasdaran, and the adoption of low-observable navigation tactics—transponders off, lights blacked out at night—transformed transit through the strait into a high-risk operation. This prolonged blockade stranded roughly 140 million barrels of oil and 1,600 ships without insurance coverage: an unprecedented form of maritime economic warfare that CIMSEC termed the war of "frozen assets," capable of paralyzing global supply chains without direct firefights. Shipping freights remained exceptionally high, and shipowners maintained maximum alert protocols even after the truce announcement.

The governance of the strait following the Memorandum of Understanding remained ambiguous and problematic. The draft agreement hands joint administration of maritime transit to Iran and Oman, granting Tehran long-term sovereign leverage over global energy trade. Mine clearance operations are estimated to take weeks, if not months; drifting and anchored mines could still threaten the seabed, a condition no insurance company is willing to overlook. While the IMO and the International Chamber of Shipping welcomed the agreement as a prerequisite for the return of roughly 20,000 seafarers stranded by the crisis, major container carriers continued to prefer the African circumnavigation, adding significant logistical costs to global supply chains.

Developments in the Black Sea and South China Sea

- In the Black Sea, Ukrainian drones struck a port and an oil depot in southern Russia, increasing uncertainty over grain and raw material export routes. Romania deployed electronic defense systems along the Danube to counter Ukrainian drone incursions, turning this river corridor

into a hybrid conflict zone adjacent to NATO territory. The Magura V5 drone explosion in Constanța demonstrated the permeability of allied territorial waters to Ukrainian military operations, carrying major legal and operational implications for the Alliance.

- In the South China Sea, China intensified patrols around Scarborough Shoal, increasing the risk of direct incidents with Philippine forces and their allies. New Chinese drilling operations in the East China Sea heighten the risk of air-naval incidents with Japan. The launch of the sail-less submarine in Wuhan and 170 sorties by the aircraft carrier *Shandong* in the Philippine Sea demonstrate Beijing's resolve to project naval power far beyond its shores.

The US response includes the commissioning of the *DDG-128 USS Ted Stevens* Flight III equipped with AN/SPY-6 radar, reinforcing Luzon in the Philippines as an advanced logistical outpost, and expanding industrial shipbuilding cooperation with Japan and South Korea.

The Arctic and Seabed Warfare

The Arctic gained increased strategic centrality. The Svalbard archipelago became a new friction point between Russia and Norway; Moscow accuses Oslo of violating international treaties via pretextual commercial sanctions and environmental restrictions, while the progressive melting of polar ice opens new commercial routes and unlocks access to rich underwater energy deposits. Russia responded to diplomatic isolation by accelerating the militarization of the Arctic, as satellite imagery documented the expansion of airbases and advanced missile systems along the NATO frontier. The "Donald J. Trump Maritime Prosperity Zone" project in Alaska directly mirrors this logic: securing emerging Arctic routes before Moscow and Beijing can.

Hybrid warfare on the seabed emerged as an autonomous operational domain. With 44 incidents in the Baltic alone between 2024 and 2025, underwater infrastructure—digital cables and gas pipelines—has become a systematic target for ambiguous operations difficult to attribute. NATO is pushing an integrated response: drone patrolling of the seabed, public-private cooperation, and legal framework updates. The European Union's Operation "Nereus 2026" in the Mediterranean, held between June 3rd and June 12th, 2026, marked a concrete step toward European maritime defense autonomy, focusing on protecting critical underwater infrastructure.

Naval Industrial Shifts

On the naval-industrial front, the period recorded significant developments among both allied and rival navies:

- Fincantieri laid the keel for the eighth PPA in Genoa, consolidating the modernization program of the Italian Navy.
- Germany and Norway pitched Type 212CD submarines to Canada for its Arctic capabilities.
- The Royal Navy deployed autonomous mine-hunting underwater drones to the Strait of Hormuz, formalizing a 15-nation coalition for freedom of navigation.
- The British RFA Resurgent program for three new Fleet Solid Support heavy logistics units aims to boost the fleet's power projection. However, the sale of *HMS Bulwark* and *HMS Albion* to Brazil for just £20 million left a gap in British amphibious capabilities until 2033.

- HII's USV Romulus passed the US Navy selection phase for sea trials, moving closer to integration into the American hybrid fleet.

The debated return of battleships in the US NDAA revealed a search for asymmetric solutions to the vulnerability of modern light units against sophisticated adversary missile systems.

The British proposal for harsher sanctions on vessels damaging submarine cables, the French seizure of a Russian oil tanker in the English Channel, and the British seizure of the *Smyrtos* in the Channel signaled that European seas are no longer a safe rear-guard but a space for direct geopolitical confrontation.

The Italian model for protecting critical underwater infrastructure—led by the Navy through the National Subsea Center (*Polo Nazionale della Subacquea*) in La Spezia—received formal international recognition at the Shangri-La Dialogue in Singapore. There, the Singapore Ministry of Defence presented the GUIDE (Guiding Principles for Underwater Infrastructure Defence Exchanges) document as a multilateral cooperation framework for defending digital cables and pipelines on the seabed of the Indo-Pacific. Finally, the Fincantieri-Republikorp agreement for Indonesian military shipbuilding further consolidated Italy's naval industrial projection in Southeast Asia.

Consequences for Italy

For Italy, the analyzed framework poses significant challenges across multiple simultaneous levels, but it also opens windows of opportunity that require a clear strategic vision and sustained investment continuity. The Italian Navy's *"Punto 2026"* ("Focus 2026") document reaffirmed the centrality of the sea for the country's security and economic prosperity, extending the fleet's operational projection beyond the Wider Mediterranean toward the Arctic and the Indo-Pacific.

The new defensive frontier is the underwater domain, coordinated by the National Subsea Center (*Polo Nazionale della Subacquea*) in La Spezia to protect data cables and gas pipelines. To guarantee strategic autonomy within NATO and the EU, the Italian Navy aims to surpass 30,000 active personnel, digitalize its bases, and adopt modular vessels equipped with artificial intelligence and uncrewed remote-controlled systems.

Energy and Financial Vulnerabilities

On the energy front, Italy's dependence on oil and gas imports from the Gulf monarchies makes the Hormuz crisis a direct systemic risk. An analysis by Carlo Altomonte (SDA Bocconi) estimated potential savings of up to €212 on the energy bills of Italian families upon the normalization of maritime freight rates following the reopening of the strait.

However, structural vulnerability remains: the US-Iran agreement leaves Mediterranean countries exposed to decisions made elsewhere in the absence of an autonomous naval power projection capability in the Gulf. Furthermore, the reduction of Italy's contribution to the SAFE (Security Action for Europe) fund—a €150 billion initiative in low-cost loans for common defense—highlights domestic budgetary constraints while simultaneously weakening Rome's diplomatic weight in

European defense decision-making.

Defense Industry Vitality

The Italian defense industry demonstrated significant vitality during the period examined:

- Fincantieri's eighth PPA (Multipurpose Offshore Patrol Vessel) confirms the centrality of the Ligurian shipbuilding hub for both Italian and European defense.
- The Beretta-Livet anti-drone system represents a new frontier for the tech autonomy of Italian Defense.
- Leonardo's Vulcano program is expanding its reach toward the US market.
- Fincantieri's success in the Maritime Security Hackathon and the participation of ELT Group at Eurosatory further underscore the sector's dynamism.
- The WASS-Magellan Aerospace agreement at CANSEC 2026 secured Italian industrial projection within the Canadian underwater defense market.
- Defense Minister Guido Crosetto's visit to the United States consolidated industrial ties with the US Navy, bringing concrete benefits to Fincantieri and Leonardo.
- The cooperation between ELT Group and Rohde & Schwarz in electronic warfare further strengthens European technological autonomy.

Political-Diplomatic and Geopolitical Landscape

On the political-diplomatic front, the international recognition of the Italian operational style by Admiral Cavo Dragone at the NATO Military Committee—characterized by technical rigor combined with human intelligence, highly valued from the Balkans to the Wider Mediterranean—represents a crucial asset to capitalize on.

The Italy-Japan axis, relaunched by Meloni and Takaichi via the GCAP program for the sixth-generation fighter jet, consolidates Italian industrial and strategic projection toward the Indo-Pacific. Concurrently, the Italy-Korea agreement on semiconductors and AI strengthens Rome's position as a European tech hub. The *"Geoadriatico 2026"* Forum boosts Trieste's candidacy as a strategic logistical hub linking the Balkans, the Mediterranean, and global corridors.

However, a GPF poll indicating that **only one in seven Italians** supports military aid to Ukraine signals a deep disconnect between public opinion and foreign policy choices. This gap underscores the need for a clearer narrative regarding the strategic reasons behind Italy's Atlantic commitment.

Regional crises continue to impact national interests:

- The Libyan crisis remains unresolved: the geopolitical vacuum in the Central Mediterranean—increasingly occupied by Turkey with its own military bases—poses a direct threat to Italian national interests regarding energy route security, migration management, and commercial projection toward Africa.
- The mortar attack against the UNIFIL base in Lebanon, which resulted in the death of one peacekeeper and the injury of others, directly involves Italy as traditionally the top personnel

contributor to the mission.

- The Albanian issue, marked by Kushner's billion-dollar real estate projects in protected Adriatic areas, exposes vulnerabilities in Rome's geopolitical projection within the Balkans.
- The Port of Trieste and infrastructural corridors toward Central Europe, alongside Italian interest in the IMEC corridor, are directly penalized by the fragility of the Middle Eastern route and the redirection of global trade routes around the Cape of Good Hope, which imposes a structural increase in logistical costs that asymmetrically impacts southern European economies.

Consequently, Rome must urgently develop an integrated maritime strategy covering the Mediterranean, the Gulf, and the Indo-Pacific.

Conclusions

The weeks from June 1st to June 18th, 2026, outlined an international system in chaotic transition, where the maritime dimension—from Hormuz to the Pacific, and from the North Atlantic seabed to the Red Sea—remains the backbone of great power rivalries.

The US-Iran Memorandum of Understanding represents a significant milestone, yet its fragility is manifest: mine clearance operations in Hormuz will take months, nuclear verification mechanisms remain insufficient, and the strait's governance hands Tehran permanent sovereign leverage over global energy trade. Meanwhile, the Russia-Ukraine conflict has entered a phase of total attrition with no swift resolution in sight, as Russia aims for superpower-exclusive negotiations and Ukraine faces a structural personnel crisis. The emerging multipolar international system offers no alternative stability; it is a system where regional conflicts mutually amplify one another.

CESMAR Recommendations

1. Continuous Monitoring: It is necessary to continuously monitor the practical implementation of the US-Iran Memorandum, with specific focus on Hormuz mine clearance operations, initial IAEA verifications of Tehran's nuclear program, and the evolution of the strait's joint governance.
2. Regional Security Architecture: Italy and Mediterranean nations must consolidate regional maritime security architectures—leveraging the operations of the National Subsea Center and the Navy's projection toward the Indo-Pacific—before trade routes permanently reshape, risk excluding them from new global logistical balances.
3. Capitalizing on Subsea Excellence: The strategic window opened by international recognition of Italian excellence in underwater security must be capitalized on via sustained investments in Fincantieri, Leonardo, and bilateral cooperation programs with Japan and South Korea.
4. Bridging the Communication Gap: Finally, the gap between public opinion and strategic necessities demands a serious communication effort: the collective security of the next decade is being decided in the weeks and months ahead.

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