

The Strait as Uncovenanted Power

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Hormuz is being rewritten from commons to managed toll; residual HEU opacity and a reweighted proxy axis fail the covenantal-republican test of limited authority.

Hormuz, Residual Nuclear Opacity, and the Reweighted Axis — 12 Tishrei 5787

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Update, Thursday 22 October 2026: Since this essay ran, US Central Command's count of commercial vessels redirected under the blockade of Iranian ports has risen from 115 (as of 23 September) to 138 (as of 17 October). On 16 October CENTCOM's commander said about 400 merchant ships had crossed the strait in the previous seven days. The UK Maritime Trade Operations centre (UKMTO), in its latest weekly overview (16 October), counted 254 transits for the seven days to 14 October, about 70% below pre-war levels, and recorded 12 attacks in that week, with one ship lost. More tankers were struck by unknown projectiles on 20 and 21 October, off Al Faw in Iraq and off Bukha in Oman (UKMTO). On 20 October the IRGC claimed that its mines had set tankers ablaze and that it had shot down a US MQ-9 drone, and on 22 October it claimed four more ships hit in the northern Gulf and three more mined west of the strait. CENTCOM called the 20 October mine claims false; none of these claims has been independently substantiated. The Houthis "second meter" described in section III has reached deep into Saudi Arabia. Saudi authorities say the 10 October strike on King Khalid International Airport in Riyadh killed 13 people, one of whom died of his injuries the next day, and injured more than 300 (BBC, NBC News, Anadolu), and the Houthis claimed the attacks (BBC). On 21 October the US State Department ordered non-emergency staff and their families to leave the kingdom (BBC, Politico); late that evening an attack on the airport in Dammam killed two people and injured eight, Saudi Arabia's civil aviation authority said (SPA). On 22 October the Houthis claimed the Dammam attack, along with strikes on the Defense Ministry in Riyadh, Aramco's Yanbu facility and Abha airport; Saudi Arabia had not confirmed those further strikes (Saba). On 19 October, in Tehran, Russia's foreign minister called for a return to "the pre-crisis situation in the Persian Gulf and the Strait of Hormuz," while Iran's foreign minister called for regional security "without the presence of foreign forces." President Trump has said the United States will not strike Iran again before the 3 November midterms. The argument below stands; the facts since have sharpened it. For the follow-ups, see *Hormuz Dual Title Holds* (30 September), *The Easy Way or the Hard Way* (4 October) and *The Runway and the Hull* (8 October).

The principle is old and short. Power that acknowledges no law above itself will seek to dominate the passages through which other nations live. Energy chokepoints are the modern form of that claim. Israel's security and the free world's order stand or fall on whether those passages remain a commons under limited authority or become a tollbooth of theocratic-military will. This cycle's work is narrower: to read what has moved in capability, intent, and risk around Iran since the last turn of the file, and to judge it by the covenantal-republican standard rather than by the mood of a news week.

I. What the waterway now is

The Strait of Hormuz is not a metaphor. It is a geographic fact through which, in ordinary years, a fifth of the world's seaborne oil has moved. After February 2026 it became the principal instrument by which the Islamic Republic tried to convert military survival into diplomatic recognition of control. That is the signal. The noise is the daily count of hulls.

Iran's method is consistent. First, force: drones, projectiles, boarding, mines, radar and fast-attack craft, and public IRGC Navy warnings that vessels must coordinate with Iranian authorities and use an Iranian traffic scheme. Second, lawfare at home: parliamentary penalties for "violators of Hormuz laws," the language of coastal-state security used to swallow freedom of navigation. Third, bargaining: reopen the strait if the blockade ends, if fees or "services" are acknowledged, if Gulf states ratify Iranian management. Fourth, denial of alternative corridors. When Oman and the International Maritime Organization sketched a southern safe route, Tehran called it dangerous and unacceptable—because a viable path outside Iranian territorial management reduces the strait's value as a hostage ([Institute for the Study of War](#)).

Competing schools misread this in characteristic ways.

Pure realism treats Hormuz as a bargaining chip to be traded for sanctions relief and a pause in strikes. It is not wrong that states use geography. It is wrong when it treats Iranian control as a stable equilibrium. A regime whose legitimacy is revolutionary export and clerical supremacy cannot sit quietly on a commons. The chip will be spent again.

Liberal institutionalism reaches for IMO schemes, UN language, and joint statements. Those instruments have value only when a navy can keep them. The June memorandum's clause on "future administration and maritime services... in line with applicable international law" assumed Gulf states would moderate Tehran. They have resisted fees and exclusive control. That is to their credit. It is not yet a regime. Institutions without enforcement become minutes of meetings while tankers burn.

Quietism and isolation argue that the strait is "their neighborhood." This is a category error. A chokepoint that rations heat and industry for democracies is not a local custom. Non-intervention here is a grant of domination to the party willing to shoot.

Maximalist deterrence that seeks only wreckage without a theory of the day after produces the present hybrid: damaged enrichment halls, reconstituted radars, residual HEU, and a waterway that is neither closed nor free. Measured deterrence that protects navigation, attrits the tools of closure, and refuses to recognize tolls is closer to the republican requirement—provided it does not confuse a ceasefire photograph with limited authority.

The covenantal-republican correction is simple and severe. Navigation through a passage necessary to the life of nations is not a privilege the strongest coastal state may meter. Honest weights and measures are a Torah demand because false measures are a form of theft that pretends to be law (Vayikra 19:35–36). A "service fee" extracted under drone threat is a false measure. Rambam's constraints on kings and wars assume power answerable to law, not power that writes the shipping code after it fires. The Amalek pattern in the tradition is not a racial curse; it is the recurring political type that strikes the straggling and calls the blow sovereignty. Energy leverage used to starve or coerce free societies is that type in steel and insurance premiums.

Sukkot adds a second image. Israel is commanded to leave the solid house and sit in a hut whose roof is incomplete. Vulnerability is not abdication. It is the public confession that security is not identical with walls. Iran's project is the opposite hut: a roof of missiles over a strait, claimed as shelter for the umma and experienced by others as a cage.

II. Nuclear residue is not a closed chapter

Kinetic damage in 2025 and 2026 was real. Declared halls at Natanz and Fordow are not the industrial machine they were. That fact is not a license for amnesia. The IAEA still cannot report the current size, composition, or whereabouts of the enriched stock. Open estimates in September 2026 continue to place on the order of four hundred kilograms of 60-percent material in the pre-war accounting, much of it assessed as entombed or stored in tunnels at Isfahan and related sites. Inspectors have been kept from the critical enrichment complexes since the 2025 war. A memorandum that spoke of on-site down-blending under Agency supervision died with the memorandum ([The New York Times](#)).

Two errors follow if this is waved away. First, the status-quo fallacy: if centrifuges are not spinning in known halls, the file is frozen. Material, know-how, and undeclared or hardened sites (including locations publicly discussed as Pickaxe / Isfahan tunnel complexes) are the file. Second, the inspection-as-ceremony fallacy: access after a final political deal is not verification; it is a prize the regime sells twice.

Covenantal politics does not require millennial trust. It requires that power over a weaponizable stock be limited by inspection that can actually see. Free will and accountability cut both ways. A regime that denies the eye cannot claim the benefit of the doubt. Israel's particularist responsibility is not to outsource that eye to a process that has already been blinded.

III. The axis, reweighted

Hezbollah entered this war already reduced by the 2024 campaign and the loss of Syrian depth. Its March 2026 intervention did not reverse Iranian fortunes. Rocket inventories are a remnant of what they were. That is a strategic gift to Israel and must not be squandered by nostalgia for a "deterrence equation" that no longer describes the north.

The Houthis have been promoted by events. Control along Yemen's Red Sea coast and islands near Bab al-Mandeb gives Iran a second meter on energy and grain, less tightly coupled to Lebanese politics and more useful while Hormuz is contested. Reporting in mid-September describes Iranian material and guidance behind Houthi advances that serve both Sanaa's local war and Tehran's campaign against U.S. and Gulf lines of communication. Iraqi militias remain the short-range tool against bases and, periodically, against Saudi and other energy nodes—the September attacks that interrupted the East–West pipeline workaround are the relevant example ([Critical Threats](#)).

Proxy warfare is deniable domination. It lets a concentrated clerical-military center punish without putting its own cities first. The republican answer is not to pretend every militia is a sovereign equal. It is to treat the command, finance, and parts pipeline as the center of gravity, and to refuse the fiction that a "pause" in one theater is peace while the second strait is seized.

IV. Alliance quality and Israeli security

Israel's interest is not identical with every American tactical choice, and it is not opposed to American success. A Hormuz that Iran manages is a world in which energy coercion can be applied to any government that arms or trades with Jerusalem. A Bab al-Mandeb under Houthis is a world in which the Red Sea route that substitutes for Suez becomes another hostage. Residual 60-percent material without inspectors is a world in which the next reconstitution is a matter of engineering, not theology.

Alliance quality therefore has a test that is not sentimental: will partners pay the cost of free navigation and verified limits, or will they buy a quiet month with language that ratifies Iranian "management"? GCC resistance to tolls is a positive indicator. UNGA atmospherics that treat blockade-lifting as the price of a photo are a negative one. Europe's energy anxiety will always pull toward a deal that postpones the principle. That pull is understandable. It is not a standard.

Particularist national responsibility does not mean Israel fights every Iranian sailor. It means Israel does not outsource the meaning of the strait. A people that has just emerged from Yom Kippur knows the difference between a vow and a press line. The vow required here is old: do not let a power that cannot be limited write the rules of the passage.

V. What would count as a real shift

Not headlines. Structure.

Traffic through Hormuz that does not require IRGC coordination or tribute, sustained, with mines and shore-based strike systems kept below the threshold of easy reconstitution.

IAEA access that can locate, quantify, and down-blend or remove the 60-percent stock—not a promise of access after a political ceremony.

Gulf and Western practice that treats fees and exclusive traffic schemes as legally void, not as items for "creative" drafting.

Until those move, the cycle remains what it is: a regime of concentrated power using geography, residual nuclear material, and a reweighted proxy set to dominate rather than to live under limit. Sukkot's hut is the counter-image. The roof is open. The law is not.

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