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On the Iran conflict & the global energy crisis

The Strait of Hormuz and the Architecture of Dependence

*An essay on invisible infrastructure,
efficiency, and who pays when systems fail*

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The Strait of Hormuz is twenty-one miles wide at its narrowest point.

Twenty percent of the world's oil passes through it. Liquefied natural gas from Qatar, crude from Saudi Arabia and Iraq and the UAE, fuel that heats homes in Europe and runs factories in Asia — all of it moves through a channel narrower than many city limits, between two countries that have been in varying states of conflict for forty years.

When Iran closed it — or rather, when the war made it effectively impassable — the effects arrived in a specific order. First the futures markets, within hours. Then shipping insurance rates, which doubled in days. Then airline fuel surcharges, which produced flight cancellations that most passengers experienced as a scheduling inconvenience before anyone explained why. Then food prices in countries that import everything, because food moves on ships, and ships run on fuel, and fuel suddenly costs more everywhere.

In Casablanca, the price of cooking oil rose eighteen percent in three weeks. In Pakistan, already at war with Afghanistan, fuel subsidies buckled under pressure the government had not budgeted for. In Frankfurt, Lufthansa announced route cuts. In Washington, emergency meetings about strategic petroleum reserves. In Lagos, diesel queues.

Twenty-one miles of water. Every piece of this.

The Strait was not designed to be a chokepoint. Chokepoints are not designed. They emerge from the intersection of geography and

dependency — from the fact that the world's demand for something is large and growing, and the routes by which that something moves happen to pass through a narrow place that other actors can threaten.

What was designed — or rather, what was built through decades of economic decisions, each individually rational — was the dependency. The global energy system did not have to be structured this way. It was structured this way because it was efficient. Gulf oil was cheap, the infrastructure to move it was already built, and the political risk of relying on it was manageable — until it wasn't.

This is the pattern underneath the crisis: modern prosperity is built on infrastructure optimized for a world that cooperates. The supply chains, the energy systems, the shipping routes, the financial networks — they were built for efficiency, and efficiency means no redundancy. No redundancy means that every node in the network is a potential chokepoint. And every chokepoint is, in principle, someone else's weapon.

The Strait was identified as a critical vulnerability for decades. Analysts wrote about it. Military planners ran scenarios. Governments published reports. The knowledge existed.

What was absent was the felt sense of the risk. Because the Strait had been open for so long, and the oil had kept flowing for so long, the risk had become theoretical. A category in a report rather than a fact in a budget. The contingency planning happened in a register that did not communicate urgency, because urgency requires proximity to failure, and the failure had not yet happened.

This is how invisible dependencies stay invisible: not because no one knows they exist, but because knowledge without felt consequence

does not produce action.

There is a distinction between resilience and efficiency that the last thirty years of economic thinking largely collapsed. The Strait is the consequence.

Efficiency means optimizing for the normal case. Eliminate redundancy, reduce costs, extract maximum output from minimum input. It produces remarkable results during the normal case — the world as it usually is, with trade flowing and routes open and political arrangements stable enough.

Resilience means optimizing for the abnormal case. Maintain redundancy, accept higher costs, ensure that failure in one node does not cascade into failure in everything. Resilience is expensive and produces no visible benefit during the normal case, which means that in any environment that measures performance against the normal case — which is every environment — resilience loses to efficiency every time.

The global energy system chose efficiency. Gulf oil was cheap, the Strait was open, and every year it stayed open was another year of evidence that the risk was overstated. The investment that would have gone into alternative routes, diversified supply, strategic reserves deep enough to matter — it went elsewhere. Into returns. Into growth. Into the assumption that the normal case would continue.

The Strait closed and the assumption expired. The cost of thirty years of efficiency over resilience is being paid right now by the people who never made the choice.

This is the part of the story that the geopolitical analysis leaves out: the distribution of the cost.

The countries that built the dependency are not the countries paying the highest price for its failure. The economies that structured their energy systems around the assumption of an open Strait, that extracted the efficiency gains for three decades — these economies have strategic reserves, diversified imports, financial buffers, and enough slack in their systems to absorb a shock that, in a developing economy, is simply not absorbable.

The eighteen percent rise in cooking oil in Casablanca is not an inconvenience. It is a budget crisis for families operating without margin. The fuel shortages in South Asian countries already under economic pressure are not a scheduling problem. They are a disruption to hospitals, water systems, food supply chains — the infrastructure of daily life that requires energy to function and has no alternative when energy becomes unavailable.

The dependency was built by decisions made in capitals and boardrooms far from Casablanca and Karachi. The efficiency gains accrued to the economies and companies at the top of the supply chain. The vulnerability — the absence of resilience that made the efficiency possible — was distributed evenly across the system. But the cost of failure is not distributed evenly. It falls hardest where the buffers are thinnest, which is precisely where the decision-making power to build the dependency was weakest.

This is not accident. It is structure. And the Strait makes it visible in a way that the normal case never does.

The Strait is not an anomaly. It is a mirror.

What it reflects is the general architecture of modern dependency — the way that prosperity in the connected world is built on infrastructure that functions invisibly and fails catastrophically. Not because the builders were reckless, but because optimizing for efficiency structurally removes the slack that would allow for graceful failure.

The digital equivalent is already visible: the handful of submarine cables that carry most of the world's data, the concentration of cloud infrastructure in three companies and a small number of physical locations, the single points of failure that everyone has identified and no one has adequately addressed because addressing them requires accepting inefficiency that the market will not reward.

The financial equivalent was visible in 2008, when the interconnection of global credit markets meant that failure in one node — the US subprime mortgage market — cascaded through every connected system in ways no individual actor had designed and no one had modeled accurately.

The pattern is consistent: build for efficiency, remove redundancy, create dependency, ignore the chokepoint until it closes. Then pay the cost in the order determined by who has the least buffer.

The Strait of Hormuz is just the version we can see from space.

What the closure reveals, finally, is not a failure of intelligence or planning or policy. The intelligence was there. The planning happened.

The policy was written.

What it reveals is a failure of imagination — the specific, structural failure of not being able to take seriously a risk that has not yet materialized. The cost of resilience is real and present. The cost of fragility is theoretical and future. In any competition between a real present cost and a theoretical future cost, the present wins, every time, in every budget cycle, across every institution and government and company that makes decisions in quarterly or annual or electoral timeframes.

The world that would have been more resilient required accepting worse returns in good years to survive bad ones. No one who built the dependency thought they were making a mistake. They were making the rational choice, given the information available and the incentive structures they were operating inside.

Which is precisely what makes this so difficult. The people who built the architecture that failed were not wrong, given their frame. The frame was wrong. And frames do not get replaced by evidence of their inadequacy — they get replaced by the catastrophe that the evidence was trying to prevent.

The Strait is the catastrophe. The next frame is being built right now, in the language of energy security and supply chain resilience and strategic autonomy. Whether it will hold against the next efficiency cycle — against the next thirty years of individually rational decisions accumulating into collective fragility — is the question that history, so far, answers only one way.

We build for the world as it is.

We optimize away the slack.

We discover the chokepoint when it closes.