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SYNOPSIS

The blockade of the Strait of Hormuz amid the Iran-Israel-US war has intensified calls for more diversified energy transport routes. What could these alternatives be, and what geopolitical implications might they have?

COMMENTARY

Since March 2026, the Israel-US war against Iran has created seismic shifts in the Middle East's energy industry and the global energy market. Iranian missile attacks on the Gulf states' refineries and ports have disrupted their energy exports, and the ongoing US and Iranian blockade of the Strait of Hormuz, through which 20 per cent of the world's oil and natural gas flows, has compounded the disruption. Iran's plans to impose a "tolling" system for ships transiting Hormuz, charging tolls in Chinese Yuan or cryptocurrency, have alarmed the Gulf states. The April 2026 International Energy Agency Report describes the current situation as the most severe oil supply shock in history.

Altogether, these developments have intensified calls to diversify energy transport routes away from the Persian Gulf and the Strait of Hormuz, and even to restructure energy supply chains across the Middle East, which could transform the region's balance of economic power. What alternative routes are there, and what geopolitical implications might they have?

Other Ways to Export

Alternatives to the Strait of Hormuz do exist within the Gulf. These include the Saudi Arabian Abqaiq-Yanbu (East-West) pipeline, which has a capacity of 7 million barrels

per day and crosses the Arabian Peninsula, linking oil refineries in Abqaiq to ports in Yanbu on the Red Sea. The United Arab Emirates' (UAE) Habshan-Fujairah pipeline, also known as the Abu Dhabi Crude Oil Pipeline, has a capacity of 1.5 million barrels per day and connects oil refineries in Habshan to ports in Fujairah on the Gulf of Oman.

However, without significant modifications, neither pipeline can replace the Strait of Hormuz, which handles up to 20 million barrels of oil per day. Furthermore, these routes are known Iranian targets and do not diversify energy supply chains beyond the Gulf, which is necessary for greater supply chain resilience. Ports in Fujairah were hit by Iranian missiles, disrupting Emirati oil exports. The Abqaiq-Yanbu Pipeline was also attacked by Iranian missiles. Shipping in Yanbu remains vulnerable to attack by the Houthis in Yemen, as occurred in 2025.

Seeking a way out of the dilemma, countries like Türkiye, Syria, Iraq and Egypt have proposed alternative routes. These routes are either new energy supply chains or expansions of existing network capacity to handle increased energy flows.

The most ambitious of these is the revived Türkiye-Syria Four Seas Project, which would create a network of energy pipelines and rail corridors linking Türkiye and Syria to the Gulf and Central Asia. This network would be based on existing and new pipelines, enabling petroleum to flow from the Gulf and natural gas from the Caucasus and Central Asia for export to Europe via Syrian ports and Turkish pipelines. The project could also connect to the proposed Turkish Middle Corridor to facilitate energy flows to East Asia via Central Asia.

The Four Seas Project was first conceived in 2009 by then-Turkish President Abdullah Gül, who proposed it to then-Syrian President Bashar al-Assad, but it did not materialise. On April 9, 2026, Turkish Foreign Minister Hakan Fidan highlighted the project during his meeting with Syrian Foreign Minister Asaad Al-Shaibani. The project's revival was reportedly supported by US Special Envoy to Syria, Thomas Barrack, who touted it as an alternative to the Strait of Hormuz.

Additionally, in April 2026, Turkish Energy Minister Alparslan Bayraktar suggested reviving a Türkiye-Qatar pipeline, proposed in 2009, to connect the two states via natural gas pipelines across the Arabian Peninsula. The pipeline may be incorporated into the Four Seas Project.

For Iraq, the Kirkuk–Ceyhan Oil Pipeline, also known as the Iraq–Türkiye Crude Oil Pipeline, offers an alternative to Persian Gulf ports in Basra, which are closed due to the Strait of Hormuz blockade. The north-bound pipeline allows Iraq to export petroleum from Kirkuk to Mediterranean ports via Ceyhan, Türkiye. In March 2026, Iraqi Oil Minister Hayan Abdel-Ghani announced that the pipeline had been tested for renewed and expanded operations.

There are also renewed proposals to build the Basra-Aqaba pipeline. First proposed in 1983, the pipeline would enable Iraqi oil to flow north from Basra to the Jordanian port of Aqaba on the Red Sea. However, political disagreements and fiscal issues have hindered its construction.

The Egyptian Suez-Mediterranean Pipeline (SUMED) is another established alternative route. The pipeline has a capacity of 2.8 million barrels per day and was built in the 1970s, allowing oil tankers too large for the Suez Canal to offload petroleum in Egypt. It starts at the Ain Sokhna Port in the Gulf of Suez, before the canal's entrance, and ends at petroleum terminal ports in Sidi Kerir on the Mediterranean coastline. Since the start of the war, Egypt's petroleum minister, Karim Badawi, has announced Egypt's readiness to support increased energy flows. The pipeline has been operating at full capacity, with petroleum flows surging by 150 per cent.

Geopolitical Impediments

Despite these possibilities, geopolitical challenges may impede greater reliance on, let alone the realisation of, these alternative routes. Fundamentally, these routes grant greater control over the energy trade to non-energy-producing and transit states, giving them leverage to impose taxes and transit tolls and to demand greater profit sharing from energy producers. Energy flows could also be held hostage and used to advance geopolitical aims.

Türkiye would gain the greatest influence, potentially becoming a new chokepoint in the Middle East's westbound energy trade and thereby increasing its regional geopolitical influence. It is unlikely the Gulf states would acquiesce in the erosion of their economic sovereignty and influence, becoming reliant on external states for a lucrative trade that remains critical to their government revenues and regional influence. This explains why the ambitious alternative routes have not materialised since their respective proposals.

Security concerns also pose a significant constraint. Pipelines and refineries are easy targets for attacks**,** maximising economic damage and triggering bilateral tensions through suspicions of political sabotage. Even the threat of an attack could deter operations, as energy companies refuse to commit to investments and insurers demand higher premiums, making operations unprofitable or refusing to insure energy operations and exports. If these alternative routes are realised, Syria and Iraq would become new chokepoints for the Gulf's energy exports, yet both remain chronically unstable.

With the complete withdrawal of US forces in April 2026, Syria faces persistent sectarian conflicts, including a resurgent Daesh, which has been conducting sporadic attacks since the collapse of the Assad regime. In Iraq, political instability and the presence of aggressive rogue militias threaten the security of proposed energy routes. Operations on the Kirkuk-Ceyhan pipeline were repeatedly interrupted by disputes with the Kurdish Regional Government and by attacks from Daesh and the Kurdish Workers Party (PKK). Persistent security risks will derail all construction plans.

The viability of such alternative energy routes requires greater regional economic/trade integration, strategic trust among regional leaders, and consistent multilateral institutional cooperation. These outcomes are impeded by persistent

sectarian differences and historical rivalries, aggravated by limited administrative capacity and insufficient fiscal resources in non-Gulf states.

Closer to Reality

The current Iran-Israel-US war has motivated the Gulf states to relook at the alternative routes, particularly those where they can exert control. In April 2026, Saudi Arabian Railways announced five new freight logistics corridors, expanding overland connections to Saudi Red Sea ports.

Saudi Arabia and the UAE have also announced collaboration on an alternative bypass around the Strait of Hormuz. New sea and land routes connect oil refineries in Dammam, Saudi Arabia, to the UAE port of Khorfakkan on the Gulf of Oman. The route would be jointly operated by Mawani (Saudi Ports Authority) and the Sharjah logistics company Gulftainer. Mawani also launched a maritime shuttle link to Bahrain, providing access to the King Abdulaziz Port in Dammam.

Yet while these planned alternatives circumvent the Strait of Hormuz, they do not address the long-term need to diversify energy routes beyond the Persian Gulf. These new routes could also be targeted in the event of intensive quarrel among regional actors and other powers impinging on the Gulf. Continued pressure on energy infrastructure in the Gulf could force greater cooperation among regional states to enable more drastic diversification. It remains to be seen whether there is political will for this outcome.

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