After the Straits: Electoral Cycles, Proxy Networks, and the Reordering of Gulf-Red Sea Security

The 2026 Iran War, the U.S. Withdrawal from Iraq, and the Mediation Diplomacy of Qatar and Oman

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Abstract

Maritime chokepoints have returned to the centre of strategic analysis, but the 2026 Gulf-Red Sea crisis cannot be explained adequately as a problem of geography or energy logistics alone. This article argues that the conflict has become a political-security system in which maritime disruption, electoral incentives, proxy networks, and the reconfiguration of external military presence are mutually reinforcing. It focuses on four developments: the October 2026 Israeli election, the November 2026 United States midterm elections, the completion of the U.S.-led coalition withdrawal from Iraq, and the expanding mediation roles of Qatar and Oman. The distinction between a "Trump win" and "Trump loss" is operationalised not as a presidential contest—Donald Trump is not on the 2026 ballot—but as Republican retention or loss of congressional control. The implications of both scenarios for war powers, appropriations, sanctions, diplomacy, and bargaining with Iran are assessed without assuming an electoral outcome. High-frequency energy and trade data show why these political developments matter materially: oil flows through Hormuz fell from 21.6 million barrels per day in the fourth quarter of 2025 to 4.9 million in the second quarter of 2026, while Bab el-Mandeb flows rose from 5.4 to 8.1 million barrels per day. The central conclusion is that the region is moving from a chokepoint crisis toward a contest over regional order. The decisive issue is no longer only whether shipping routes can be reopened, but which institutional and political arrangements will govern coercion, mediation, and security after the immediate crisis.

Keywords: Strait of Hormuz; Bab el-Mandeb; Iran; U.S. midterm elections; Israel; Iraq; Houthis; Qatar; Oman; Gulf security.

1. Introduction: From Maritime Vulnerability to Political Reordering

More than 80% of world merchandise trade by volume is carried by sea, and the security of maritime transport has therefore become inseparable from the security of the global economy (UN Trade and Development [UNCTAD], 2026a). The vulnerability of this system is concentrated at a relatively small number of chokepoints. In the five years preceding the present crisis, disruptions were recorded at the Suez Canal, the Panama Canal, the Bosporus, Bab el-Mandeb, and the Strait of Hormuz; taken together, these passages carry a substantial share of global maritime flows (Boston Consulting Group [BCG], 2026). The resulting exposure has usually been analysed through the geometry of trade: whether an alternative route exists, how much distance is added when rerouting occurs, and which sectors or countries absorb the greatest cost. That line of analysis remains necessary, but it is not sufficient to explain what has happened across the Gulf and Red Sea during 2026.

The current crisis has demonstrated that a maritime chokepoint is not merely a narrow stretch of water. It is also a political transmission mechanism. Military decisions taken in Washington, Tehran, Jerusalem, Sana'a, Baghdad, Riyadh, Doha, and Muscat are translated into shipping risk, insurance premiums, fuel prices, sanctions exposure, and the willingness of firms to move cargo. Conversely, disruptions in shipping and energy markets are transmitted back into domestic politics. Fuel prices affect the political incentives of elected governments; military losses and security failures shape electoral narratives; revenue disruption changes the bargaining posture of hydrocarbon exporters; and prolonged uncertainty encourages states to search for mediated arrangements that would previously have appeared too politically costly. The relationship between geopolitics and maritime security is therefore recursive rather than linear.

The scale of the economic transmission is measurable. Before the 2026 conflict, oil flows through the Strait of Hormuz averaged 21.6 million barrels per day in the fourth quarter of 2025. By the second quarter of 2026, they had fallen to 4.9 million barrels per day. Over the same interval, oil flows through Bab el-Mandeb increased from 5.4 million to 8.1 million barrels per day, reflecting the partial diversion of Gulf exports toward the Red Sea and other workarounds (U.S. Energy Information Administration [EIA], 2026a). Liquefied natural gas was even less adaptable. Disruptions through Hormuz temporarily removed approximately 20% of global LNG supply from normal circulation, most of it Qatari, while roughly 80% of Qatari LNG had traditionally been absorbed by Asian buyers (EIA, 2026b). The resulting shock was sufficiently large for the International Energy Agency to coordinate the release of 400 million barrels of emergency oil stocks by 32 member states, the largest collective action in the agency's history (International Energy Agency [IEA], 2026).

This article therefore departs from route-centred studies of 'chokepoint coupling' by shifting the unit of analysis from infrastructure to political order. Chokepoints are treated as strategic transmission belts through which electoral incentives, alliance structures, proxy relationships, sanctions, and mediation are converted into market and security effects. The article asks three questions. First, how are the U.S. and Israeli electoral calendars likely to affect incentives for escalation, restraint, and negotiated settlement? Second, what security consequences follow from the U.S. withdrawal from Iraq at a time when Iran-linked militias and Islamic State remnants remain relevant? Third, how are Gulf states—and particularly Qatar and Oman—attempting to manage a crisis in which they are simultaneously exposed to Iranian coercion, dependent on

external security relationships, and interested in preventing a permanently militarised regional order?

No electoral outcome is predicted; alternative results in both countries are treated as conditional scenarios, defined in Section 2. Elections do not mechanically determine war policy, but they alter institutional constraints, oversight, legislative support, diplomatic room for manoeuvre, and the political price of compromise. The article concludes by developing conditional regional scenarios for 2027 rather than forecasting electoral winners.

2. Analytical Approach and Source Base

The study is designed as a structured qualitative analysis supported by high-frequency quantitative indicators. It is not presented as a causal econometric test, nor are electoral outcomes forecast. It draws on three bodies of evidence. First, official and quasi-official data are used to establish the material scale of maritime disruption, including the U.S. Energy Information Administration's chokepoint-flow estimates, International Energy Agency emergency-stock decisions, International Monetary Fund macroeconomic assessments, UNCTAD maritime-trade statistics, and Gulf Cooperation Council statements. Second, institutional documents are used to establish the timing and legal-political significance of elections and military transitions, including the Federal Election Commission, the Israel Democracy Institute, the U.S. Department of Defense, the Kurdistan Regional Government, and the Omani Foreign Ministry. Third, Reuters reporting is used for rapidly changing developments for which primary documentation is incomplete or delayed, including mediation contacts, congressional votes, market responses, and the final stages of the U.S. withdrawal from Iraq.

The maps and charts were prepared by the author for this article and show relationships among route exposure, conflict theatres, and political decision points rather than any institution's proprietary modelling. Statistical figures are reported with their original units and time periods. Where tanker-tracking or AIS-based estimates are used, the limitations identified by the EIA are acknowledged because conflict conditions can reduce signal reliability and lead to frequent revisions.

The scenario sections are conditional rather than predictive. In the United States, “Trump win” is used as shorthand for Republican retention of both chambers of Congress, while “Trump loss” denotes Democratic control of at least one chamber; Trump himself is not a candidate in the 2026 midterms. In Israel, continuity and change-of-government scenarios are assessed without assigning probabilities to either. The analytical objective is to identify institutional transmission mechanisms—war powers, appropriations, oversight, coalition formation, sanctions, and mediation—through which electoral outcomes could affect the Iran conflict.

3. Conceptual Framework: Chokepoints as Political Transmission Belts

The modern literature on maritime chokepoints has generally been organised around three variables: volume, substitutability, and rerouting cost. The intuitive logic is straightforward. A route becomes more strategically consequential when large volumes pass through it, when viable substitutes are absent, and when disruption generates substantial distance, time, and cost penalties. BCG's 2026 study formalised this intuition for business risk by comparing the world's principal chokepoints according to transit volume and reroutability. It reported, for example, that a Bab el-Mandeb diversion could add roughly 44% to distance, while some captive straits have

no practical maritime alternative at all (BCG, 2026). Sectoral exposure was also shown to vary sharply: approximately 95% of mining trade and 89% of energy trade by volume are maritime, while around 30% of energy's ocean trade passes through Hormuz. Such measures are useful because they reveal hidden exposure beyond oil itself.

Existing scholarship points to political mechanisms that a purely route-centred account can miss. Research on the U.S. use of force shows that congressional partisanship and interbranch relations can condition major military action rather than merely react to presidential decisions (Howell & Pevehouse, 2005). Work on proxy conflict likewise treats support for armed non-state actors as a delegation problem: sponsors can gain reach, deniability, and lower direct costs, but they also surrender some control over agents whose preferences may diverge from their own (Salehyan, 2010). Small-state diplomacy adds a third mechanism. Studies of Qatar show how limited material size can be offset through mediation, access, financial resources, and relationships across rival camps (Kamrava, 2011; Cooper & Momani, 2011), while research on Oman describes mediation as part of a wider strategy for preserving sovereign room for manoeuvre through sustained interlocution with competing powers (Worrall, 2021). This literature is usually treated separately. Bringing them into a chokepoint framework suggests that maritime vulnerability is mediated by domestic institutions, delegated coercion, and diplomatic broking. The concept of the political transmission belt developed here therefore does not replace established accounts of war powers, proxy relations, or small-state mediation; it links them to the maritime infrastructure through which their political consequences become economically and strategically visible.

The limitations of a purely spatial approach become apparent once conflicts are prolonged. A route is not opened or closed by geography. Passage depends on political decisions by states and armed groups, on the willingness of insurers to cover risk, on the availability of naval protection, and on the credibility of diplomatic arrangements. A physically open channel may become commercially non-viable before it is formally closed. Conversely, a heavily contested route may continue to move significant volumes when military protection, state guarantees, and commercial incentives are sufficient. Chokepoint vulnerability should therefore be conceptualised as a composite of physical geography, coercive capability, commercial risk tolerance, and political bargaining.

For present purposes, the term 'political transmission belt' is used to describe a maritime node through which strategic decisions made in one domain are converted into consequences in another. The Strait of Hormuz provides the clearest example. Restrictions on passage do not merely reduce export volumes. They influence U.S. gasoline and diesel prices, European inflation, Asian LNG procurement, Gulf fiscal balances, Iranian foreign-exchange earnings, and the political credibility of governments promising to secure energy flows. Bab el-Mandeb functions similarly. Pressure applied by the Houthis can raise shipping costs far beyond Yemen, alter the economic value of Saudi Red Sea infrastructure, and complicate any attempt to use western export routes as a substitute for Gulf terminals. Political decisions become market signals, while market outcomes feed back into political decision-making.

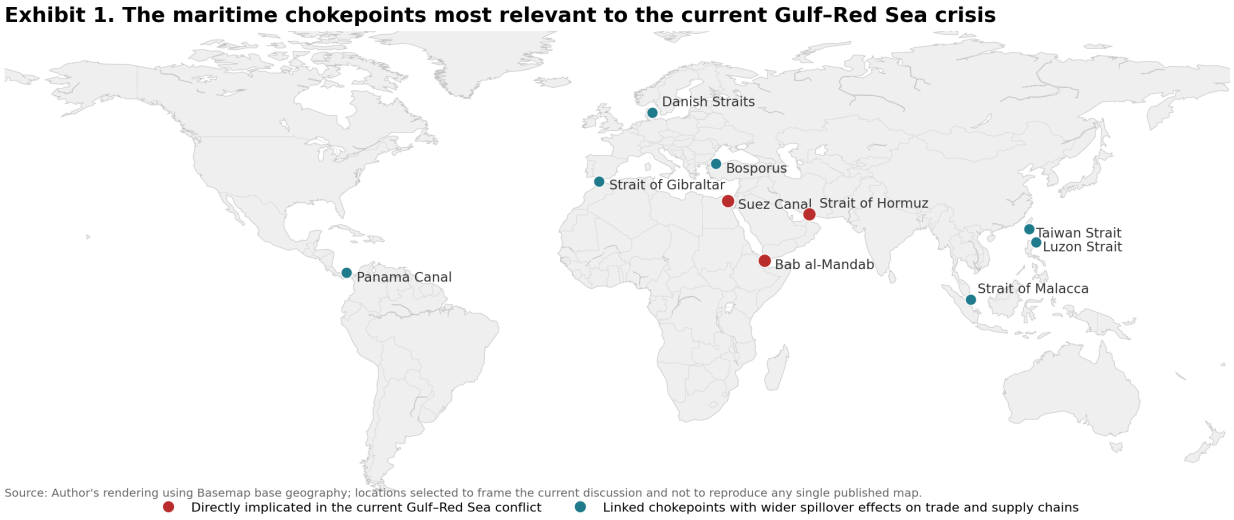
This reciprocal logic can be described through four transmission channels. The first is coercive transmission. A missile, drone, mine, seizure, or threatened attack affects shipping behaviour even when physical destruction is limited. UNCTAD observed in September 2026 that freight and insurance costs can rise quickly when navigation is threatened, underscoring that maritime security is simultaneously an economic and development issue (UNCTAD, 2026b). The second channel is fiscal transmission. Hydrocarbon exporters depend on export access, while importing

states depend on affordable supply. Revenue losses or import-price shocks therefore change the domestic cost of continuing conflict. The third channel is institutional transmission. Elections, legislative votes, sanctions regimes, war-powers debates, and coalition withdrawals can alter the decision-making environment in which force is authorised or restrained. The fourth channel is diplomatic transmission. Mediation becomes more valuable as direct communication becomes politically costly, allowing small and medium powers with trusted channels—especially Qatar and Oman—to exercise influence disproportionate to their military weight.

A distinction must also be drawn between structural and strategic coupling. Structural coupling occurs when routes, markets, and infrastructure are linked by trade geometry. Strategic coupling occurs when political actors deliberately exploit those linkages. Houthi activity at Bab el-Mandeb has strategic value precisely because Red Sea insecurity can frustrate attempts to mitigate Hormuz disruption. Iranian influence in Iraq has strategic value because pressure can be generated through actors and territories outside Iran's borders. U.S. sanctions have strategic value because their consequences are magnified through the global financial system. Gulf mediation has strategic value because access to several parties can be used to reduce the risk that one theatre triggers escalation in another.

The framework also clarifies why elections deserve inclusion in what might otherwise appear to be an energy-security study. Electoral systems alter the distribution of authority and political accountability. In the United States, congressional control affects appropriations, oversight, investigative power, sanctions legislation, arms-transfer politics, and the practical salience of the War Powers Resolution. In Israel, coalition composition affects the durability of the incumbent security doctrine, the relationship with Washington, the framing of war aims, and the domestic legitimacy of negotiated arrangements. Elections are therefore not external variables added to a maritime analysis. They are part of the institutional infrastructure through which the crisis is governed.

Figure 1. Major maritime chokepoints relevant to the 2026 Gulf-Red Sea crisis.



Note. Author's map. Locations indicate direct and indirect exposure to the 2026 disruption.

4. Empirical Baseline: The 2026 Gulf–Red Sea Shock

The 2026 conflict has created an empirical environment in which the political-transmission framework can be tested. Three features are especially important: the scale of the flow shock, the unevenness of adaptation, and the persistence of systemic uncertainty. The oil-flow data show an abrupt redistribution rather than a uniform collapse. According to the EIA, Hormuz flows of crude oil, condensate, and petroleum products fell from 21.6 million barrels per day in the fourth quarter of 2025 to 14.9 million in the first quarter of 2026 and then to 4.9 million in the second quarter. Bab el-Mandeb moved in the opposite direction, rising from 5.4 to 5.6 and then to 8.1 million barrels per day. Suez and SUMED remained comparatively stable, while Malacca flows also declined from 24.9 to 16.6 million barrels per day between the fourth quarter of 2025 and the second quarter of 2026 (EIA, 2026a). These shifts show that disruption has been redistributed across the maritime system rather than confined to one passage.

The EIA data are based partly on tanker-tracking information and should be interpreted with caution because vessel-transponder behaviour has become less reliable during conflict. The underlying pattern, however, is supported by multiple market indicators: rerouting increased, Red Sea exposure rose, and oil production had to be shut in when exports could not be moved. In August 2026, the EIA estimated crude-production shut-ins at 6.7 million barrels per day, up from 5.0 million in July. Its September Short-Term Energy Outlook expected flows through Hormuz and Bab el-Mandeb to remain constrained and variable through the fourth quarter, although the agency itself noted that its modelling inputs predated some subsequent attacks and therefore had to be treated as a baseline rather than a real-time forecast (EIA, 2026c).

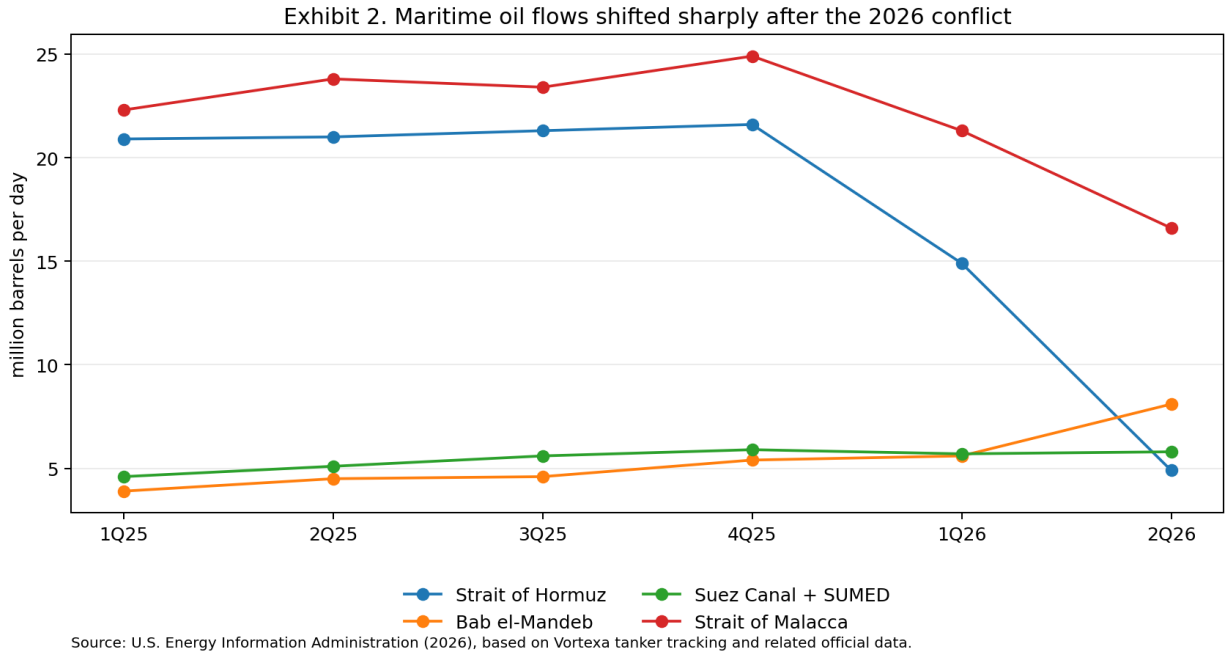
Adaptation has, nevertheless, been extensive. Saudi Arabia's East-West Pipeline and Red Sea terminals, the United Arab Emirates' Fujairah export infrastructure, strategic storage, ship-to-ship transfers, and inventory drawdowns have all reduced the probability that the disruption would become an absolute supply cessation. Yet the capacity of these mechanisms has been repeatedly tested by attacks and logistical bottlenecks. This is why the present article avoids treating resilience as synonymous with throughput. A system may continue to move oil while becoming much more expensive, opaque, and dependent on political guarantees. That distinction is important when political incentives are analysed, because electorates are affected not only by physical shortages but by price, inflation, and visible government responses.

The LNG shock illustrates the constraint more sharply. In March, more than 10 billion cubic feet per day of global LNG supply—approximately one-fifth of the global total—was affected by Hormuz disruption, with Qatar bearing the largest share (EIA, 2026d). Qatari exports had reached approximately 10.6 billion cubic feet per day in 2025, making the country one of the world's three largest LNG exporters alongside the United States and Australia (EIA, 2026b). Because Asia normally receives more than 80% of Qatari LNG, the disruption produced a particularly strong procurement shock in Asian markets. By late September, Qatar-linked LNG traffic through Hormuz had begun to increase again, but the recovery remained incomplete and vulnerable to security reversals (Reuters, 2026f). Qatar's economic exposure therefore reinforces, rather than diminishes, its incentive to mediate.

The global response confirms the scale of the shock. The IEA's 400-million-barrel emergency stock release was unprecedented in size (IEA, 2026). The IMF found that oil prices initially

surged and then traded largely in a range of $90-$100 per barrel during much of the conflict's early period, while inventory drawdowns and production outside the Gulf helped prevent an even more severe price spike (Natal & Sadikov, 2026). By July, global growth had been projected at 3.0% for 2026 and 3.4% for 2027, but the IMF warned that disinflation had stalled and that the distributional effects were highly uneven (IMF, 2026). Vulnerable energy importers, low-income states, and countries with weak fiscal buffers were exposed far more heavily than large diversified economies.

Figure 2. Maritime oil flows shifted sharply after the 2026 conflict.



Note. Data from EIA (2026a), based on Vortexa tanker tracking and related official sources. AIS-based estimates are subject to revision under conflict conditions.

Table 1. Selected statistical indicators of the 2026 shock

Indicator	Statistic	Why it matters	Source
World merchandise trade carried by sea	More than 80% by volume	Maritime security is a global macroeconomic variable, not a regional niche issue.	UNCTAD (2026a)
Hormuz oil flows	21.6 mb/d (4Q25) → 4.9 mb/d (2Q26)	Shows the scale of direct disruption at the main Gulf outlet.	EIA (2026a)
Bab el-Mandeb oil flows	5.4 mb/d (4Q25) → 8.1 mb/d (2Q26)	Shows redistribution of flows and the growing importance of the Red Sea route.	EIA (2026a)
Hormuz LNG disruption	Approx. 20% of global LNG supply affected in March 2026	Demonstrates the limited flexibility of Qatari LNG geography.	EIA (2026d)
IEA emergency stock action	400 million barrels from 32 member states	Largest collective oil-stock release in IEA history.	IEA (2026)
Crude production shut-ins	6.7 mb/d in August 2026	Indicates that export constraints translated into upstream losses.	EIA (2026c)
U.S. public opinion context	Reuters/Ipsos: 32% Trump approval; 34% approved Iran strikes; n=1,277 adults; MOE +/-3 points	Shows domestic political salience without forecasting the election.	Reuters (2026g)

Note. mb/d = million barrels per day; MOE = margin of error.

5. Electoral Politics as a Strategic Variable

5.1 United States: Congressional Control and War Powers

In the United States, the 3 November 2026 elections are midterms (Federal Election Commission [FEC], 2026). Following the definitions in Section 2, the relevant scenarios concern whether Republicans retain congressional control or Democrats gain one or both chambers. The presidency itself does not change under either outcome. The executive branch would continue to direct military operations, diplomacy, sanctions implementation, and much of day-to-day foreign policy; what would change is the legislative environment within which those powers are exercised.

The importance of Congress has already been demonstrated. In September, the Senate rejected by 50-49 a resolution intended to constrain Trump's authority to continue hostilities against Iran without congressional approval; the measure had previously passed the House (Reuters, 2026n). The narrow margin is institutionally revealing. It shows that war-power oversight is not an abstract constitutional debate but a live political fault line. A shift of only a small number of seats could alter the legislative balance over future authorisations, reporting requirements, appropriations conditions, and investigations. It would not necessarily terminate hostilities, because presidents retain substantial commander-in-chief authority and because legislative restrictions can be contested. It would, however, change the bargaining environment.

Domestic pressure is also visible in public opinion. A Reuters/Ipsos poll conducted in September among 1,277 U.S. adults, with a margin of error of approximately three percentage points, reported Trump's overall approval at 32%, approval of the strikes on Iran at 34%, and a widespread expectation that the conflict would be prolonged (Reuters, 2026g). Such figures should not be treated as an election forecast, particularly because the sample covered adults rather than only likely voters and because congressional races are district- and state-specific. They do show that the war and the cost of living have become part of the domestic political environment in which candidates campaign. Trump's decision to undertake an intensive pre-election campaign schedule was explicitly linked to Republican efforts to retain congressional control (Reuters, 2026h).

A Republican retention scenario would likely preserve a more permissive legislative environment for the administration's existing Iran policy. Appropriations for military operations would be less likely to face hostile committee control, oversight hearings would more often be conducted by members broadly aligned with the administration, and war-power restrictions would remain difficult to enact over presidential opposition. Sanctions legislation could be used to reinforce economic pressure, as seen in the administration's September measures against procurement networks supporting Iranian weapons capabilities (Reuters, 2026). Such an outcome could strengthen the White House's claim that its approach had survived an electoral test, even though congressional elections are not referenda on a single foreign-policy issue.

Yet a Republican midterm “win” would not predetermine continued escalation. Political validation can produce two opposite incentives. It can reduce pressure to compromise by convincing an administration that coercive policy has domestic support. It can also make diplomacy easier by reducing fears that negotiation will be interpreted as electoral weakness. If military and economic pressure were believed to have improved the U.S. bargaining position, a retained congressional majority could be used to support a negotiated outcome that is framed as the product of strength. Qatar's current mediation demonstrates that this possibility is not hypothetical. As of 30 September, Iran had received U.S. feedback through Qatari mediators on a

seven-day trust-building proposal involving steps related to Hormuz and the sequencing of de-escalation (Reuters, 2026d). Legislative alignment could therefore support either sustained coercion or a controlled settlement, depending on the administration's assessment of the military balance.

A democratic gain of one or both chambers would create a different institutional environment. Committee chairs could change, investigations could intensify, and further war-power resolutions could be introduced. Appropriations bills could become vehicles for reporting requirements, operational conditions, or restrictions on specific forms of military activity. The politics of arms transfers and support to Israel could also become more contested, as shown by recent Senate votes over reporting on human rights issues in the West Bank (Reuters, 2026m). None of these mechanisms would automatically end the Iran war. The most plausible effect would be to increase the transaction costs of prolonged military operations and require the administration to defend its objectives more systematically before Congress.

A midterm setback for Republicans could also produce divergent executive responses. One possibility would be diplomatic acceleration. If divided government were expected to make future appropriations and oversight more difficult, an incentive could arise to lock in a ceasefire or negotiated framework before the new Congress becomes fully operational. A second possibility would be executive unilateralism. Presidents facing hostile legislatures have historically relied more heavily on executive instruments in foreign affairs, including sanctions, covert authorities, and diplomatic agreements that do not require treaty ratification. A third possibility would be strategic hardening before January, especially if military planners believed that operational opportunities were temporary. These pathways are conditional rather than mutually exclusive.

Table 2. Conditional U.S. congressional outcomes and implications for the Iran war

Outcome	Congressional effects	Likely pressure points	Diplomatic implications
Republicans retain House and Senate	War-powers restrictions remain difficult; aligned committee control; easier defence appropriations.	Potential continuation of coercive strategy; sanctions expansion; lower legislative friction.	Could support either escalation or bargaining-from-strength; outcome depends on White House strategy.
Democrats gain House only	Greater investigations and appropriations bargaining; Senate may still block binding constraints.	More public scrutiny of war aims, casualties, and funding.	Could increase incentives for a negotiated framework before new oversight hardens.
Democrats gain Senate	War-powers measures, appointments, and reporting conditions become more contestable.	Higher institutional transaction costs for prolonged hostilities.	Could encourage diplomacy, but executive military and sanctions authorities remain substantial.
Democrats gain both chambers	Sustained oversight and funding conflict become more likely; presidential veto remains relevant.	Greater contestation of war authority and U.S.-Israel policy coordination.	Could accelerate settlement efforts or produce executive unilateralism; neither outcome is automatic.

Note. These are institutional scenarios, not forecasts of the 2026 election outcome.

5.2 Israel: Continuity or Change of Government

The Israeli election on 27 October presents a parallel set of possibilities (Israel Democracy Institute [IDI], 2026). A continuity scenario, in which Netanyahu or a similarly oriented coalition

remains in office, would be expected to preserve the existing emphasis on military freedom of action and coercive deterrence toward Iran. The domestic political narrative would likely stress that sustained pressure had degraded Iranian capabilities and that premature compromise could allow recovery. Coordination with Washington would remain essential, but recent strains in U.S.-Israeli relations show that strategic alignment does not eliminate differences over timing, war aims, or diplomacy (Reuters, 2026a). A continuity government could therefore support talks while opposing any settlement perceived to leave Iranian military capacity insufficiently constrained.

A change-of-government scenario would introduce different political incentives without necessarily changing Israel's perception of Iran as a major threat. A centrist-led coalition containing former security officials could retain a hard line on Iranian military capabilities while placing greater emphasis on restoring coordination with Western allies, clarifying war termination objectives, and separating the Iran theatre from other disputes that have eroded Israel's international position. It might also be more open to an externally mediated sequencing arrangement if such a framework were backed by credible verification and U.S. guarantees. Conversely, an incoming government could initially adopt a firm posture in order to avoid appearing weak during a transition. The effect of electoral change would therefore be more likely to concern strategy, alliance management, and the definition of acceptable end states than a simple binary between war and peace.

6. Iraq After the U.S.- Led Coalition: Sovereign Transition or Security Vacuum?

The completion of the U.S.-led coalition withdrawal from Iraq on 30 September 2026 represents a second structural shift in the regional security environment. It should neither be described automatically as abandonment nor dismissed as a routine basing adjustment. The transition was negotiated in advance and was rooted in the two-phase plan announced by Washington and Baghdad in 2024. Under that framework, the coalition mission in Iraq was to end first, while support for counter-Islamic State operations in Syria would continue from Iraqi territory until at least September 2026, subject to conditions and political consultation (U.S. Department of Defense [DoD], 2024). The withdrawal, therefore, has a legal and diplomatic history that predates the present Iran war.

The strategic context in which the plan has been implemented is, however, very different from the one in which it was negotiated. By the end of September 2026, the U.S.-Iran war had lasted seven months, Iran-aligned militias remained politically and militarily significant inside Iraq, and the Kurdistan Region had been exposed to repeated missile and drone attacks. The Kurdistan Regional Government publicly warned on 28 September that U.S. forces would leave without an alternative air-defence system being established, describing the timing as sensitive for both Iraqi and regional security (Kurdistan Regional Government [KRG], 2026). Reuters subsequently reported that the final U.S. and coalition personnel were leaving Iraqi bases, with some capabilities shifted to Jordan and other forms of remote support expected to continue (Reuters, 2026k).

The term vacuum must therefore be used carefully. A security vacuum is not the literal absence of state authority. Iraqi armed forces, federal institutions, the Popular Mobilisation Forces, Kurdish Peshmerga formations, intelligence services, and regional commands will remain. The

relevant question is whether the balance among these actors becomes more difficult to manage when a major external security presence is removed. In this sense, a vacuum is relational. It exists when capabilities or deterrent functions disappear more quickly than domestic institutions can replace them, allowing non-state or semi-state actors to expand room for manoeuvre.

Three risks are especially relevant. The first concerns militia autonomy. Iran-aligned groups have long operated within a complex institutional environment in which some formations are legally embedded in the Iraqi security system while retaining distinct political and external relationships. The U.S. presence imposed costs and constraints on attacks against Western targets and provided Baghdad with a degree of strategic balancing space. Its removal could strengthen actors that interpret withdrawal as evidence that sustained pressure succeeds. Iran has indeed presented the departure as a strategic success and as part of a wider reduction of U.S. influence in the region (Reuters, 2026c).

The second risk concerns the Islamic State. Territorial defeat did not eliminate the organisation's ability to conduct insurgent attacks, exploit rural and border spaces, or benefit from gaps between Iraqi and Kurdish forces. The original transition plan acknowledged that the Islamic State threat in Syria remained significant and that continued counterterrorism cooperation would be required (DoD, 2024). The danger is not necessarily a return to the territorial caliphate model of 2014. A lower-level insurgent revival could still impose substantial security costs, divert Iraqi resources, and increase dependence on militia forces that are themselves politically contested.

The third risk concerns air and missile defence. The 2026 conflict has demonstrated the strategic relevance of drones and missiles to actors that cannot match the conventional capabilities of the United States, Israel, or Gulf militaries. The absence of a replacement air-defence umbrella in the Kurdistan Region is therefore more than a local technical problem. It raises questions about the protection of energy infrastructure, airports, logistics corridors, and civilian areas. The risk is magnified if Iraq is used as an arena for pressure between Iran and its adversaries while Baghdad seeks to preserve formal neutrality.

For the Gulf states, the consequences are direct. Iraq links the Gulf to the Levant, Turkey, Iran, and Syria. Its airspace, pipelines, electricity networks, and land corridors give it importance beyond its borders. A more coherent Iraqi state could become a stabilising buffer and a venue for Arab-Iranian engagement. A more fragmented Iraq could become a permissive arena for militia competition, sanctions evasion, drone operations, and pressure on Gulf infrastructure. The withdrawal should therefore be treated as a major variable in Gulf security planning rather than as a bilateral U.S.-Iraq matter.

7. Iran, the Houthis, and the Logic of Distributed Pressure

The Houthis are central to Iran's wider distributed-pressure environment. Bab el-Mandeb is not simply a Yemeni or Red Sea issue. It is one of the world's principal maritime connectors, and its strategic value increases whenever Gulf exports are redirected westward. This creates a form of leverage that is disproportionate to Yemen's economic weight. Houthi missiles, drones, coastal control, and threats to shipping can raise the cost of alternatives that would otherwise reduce dependence on Hormuz. The effect is magnified when Saudi infrastructure or vessels are targeted, because the Red Sea corridor is simultaneously a commercial route and a strategic bypass.

Recent Houthi advances along Yemen's Red Sea coast and renewed attacks on Saudi Arabia have therefore had implications far beyond the battlefield. In September, the planned Gulf-Iran

meeting in Oman on Hormuz arrangements was postponed amid worsening regional conditions, including escalation in Yemen (Reuters, 2026b). This is an important example of strategic spillover: developments around Bab el-Mandeb directly reduced the diplomatic feasibility of negotiating the future of Hormuz. The maritime theatres were thus linked politically even when the negotiations were formally about only one of them.

Iran's use of distributed pressure should not be interpreted as evidence of complete command over all allied actors. Degrees of autonomy differ, and attribution has repeatedly been contested. This distinction matters because over-centralising the analysis can lead to false assumptions about deterrence. Pressure applied to Tehran may not automatically stop every militia attack, while concessions granted in one theatre may not be sufficient to alter behaviour in another. A durable settlement therefore requires mechanisms that address not only state-to-state military activity but the incentives and capabilities of non-state actors.

Economic pressure is also shaping Iranian choices. U.S. sanctions and the blockade have sharply reduced Iran's ability to export oil, while domestic inflation, currency weakness, and shortages have increased the social cost of prolonged conflict (Reuters, 2026e). The administration has continued to expand sanctions against procurement networks and entities linked to Iranian military capabilities (Reuters, 2026l). Yet economic coercion creates ambiguous incentives. It can strengthen the bargaining case for negotiation, but it can also increase the perceived value of maritime disruption by raising the price paid by adversaries. If Iran believes that keeping Hormuz partially constrained imposes politically salient costs on the United States and Europe, economic pain at home may not translate directly into de-escalation.

The effect of U.S. and Israeli elections on Tehran's strategy should therefore be analysed as a matter of expectations. If Iranian decision-makers believe that Republican congressional losses would increase U.S. legislative pressure for restraint, an incentive may arise to delay concessions in the hope of negotiating under a more constrained American executive. If they believe Republican control will be retained and sanctions will intensify, earlier bargaining may become more attractive. Yet attempts to influence U.S. politics directly, such as the IRGC appealing to American voters, can generate backlash and reduce the credibility of domestic anti-war arguments (Reuters, 2026c). Electoral uncertainty thus creates strategic temptation but also strategic risk.

8. Gulf States, Qatar, and Oman: Hedging Between Deterrence and Mediation

The collective GCC position toward Iranian attacks has been firm. In July, the member states condemned attacks on Saudi and Qatari tankers and on the territories of Bahrain and Kuwait, called for the unconditional reopening of Hormuz, and invoked international law and freedom of navigation (Gulf Cooperation Council [GCC], 2026). Similar condemnations followed later incidents. These statements show that mediation has not been accompanied by neutrality about attacks on civilian shipping. Gulf governments have simultaneously demanded protection of navigation and sought to prevent the conflict from becoming a permanent regional war.

The UAE has responded strongly through infrastructure and strategic autonomy. Abu Dhabi has accelerated efforts to expand export capacity outside Hormuz, reinforce eastern ports, and reduce reliance on a single maritime passage. Senior Emirati officials have argued that national energy exports cannot remain permanently vulnerable to decisions made by Iran and that greater national and regional security capacity is required even where U.S. security partnerships remain important (Reuters, 2026i). The approach reflects a broader shift in Gulf security thinking: U.S.

power is still regarded as essential, but reliance on a single external protector is no longer treated as sufficient.

Saudi Arabia faces a related but distinct challenge. Its East-West Pipeline and Yanbu infrastructure provide greater geographic flexibility than is available to several neighbours, but the Red Sea corridor has become exposed to Houthi pressure and other attacks. The crisis has also placed renewed emphasis on Saudi-UAE coordination after a period of bilateral tension over Yemen and regional strategy. A high-level UAE visit to Saudi Arabia in late September suggested that the two states were exploring closer cooperation as Houthi advances and regional insecurity intensified (Reuters, 2026j). Whether tactical reconciliation becomes a durable strategic convergence remains uncertain, but the incentives for coordination have clearly increased.

Qatar's role is different because its core economic exposure is LNG. The country is one of the world's largest LNG exporters, and the physical geography of Ras Laffan makes Hormuz indispensable to normal export operations. The disruption of approximately 20% of global LNG supply in early 2026 therefore represented both a global market shock and a direct national vulnerability (EIA, 2026d). By late September, some Qatar-linked LNG traffic had resumed, but shipping remained dependent on the security environment (Reuters, 2026f). These conditions create a powerful incentive for Doha to prevent maritime coercion from becoming institutionalised.

That incentive has been translated into diplomacy. Qatar maintained close contact with Washington throughout the conflict and, by late September, was facilitating renewed indirect U.S.-Iran engagement. On 30 September, Reuters reported that Iran had received U.S. feedback through Qatari mediators on a seven-day trust-building plan designed to create a sequence for reopening Hormuz and easing tensions (Reuters, 2026d). The importance of this channel lies less in any single proposal than in the political function it performs. Qatar can transmit ideas between parties that may be unable or unwilling to communicate directly without domestic political cost.

Oman performs a complementary role. Muscat has long cultivated a reputation for discreet diplomacy and balanced regional relationships. In July, the Omani Foreign Ministry reaffirmed its commitment to neutral cooperation with all parties to restore freedom of navigation through Hormuz in accordance with international law (Ministry of Foreign Affairs of Oman, 2026). In September, Oman attempted to host a broader regional meeting on the future of the strait, but the meeting was postponed in the interest of achieving consensus as regional tensions worsened. The postponement should not be read simply as diplomatic failure. It revealed the limits of mediation when the underlying military environment remains unstable, while also demonstrating that a regional forum remains conceivable.

The distinction between Qatari and Omani mediation is analytically useful. Qatar's comparative advantage lies in high-level access, transactional diplomacy, and the ability to move quickly between Washington, Tehran, and other capitals. Oman's comparative advantage lies in discretion, continuity, and the political credibility of lower-profile facilitation. Doha can help generate momentum; Muscat can help sustain channels when high-profile initiatives become politically difficult. A durable arrangement may ultimately require both functions.

A central strategic question is whether mediation can be institutionalised beyond crisis management. Temporary arrangements on navigation, deconfliction, or maritime communication could reduce immediate risk, but they would remain fragile if proxy competition in Iraq and Yemen continued unchecked. For mediation to shape regional order rather than merely pause violence, maritime arrangements would need to be linked to wider understandings about attacks

on civilian shipping, missile and drone operations, respect for Gulf state territory, and mechanisms for managing disputes. Such an agenda would be ambitious, but the present crisis has demonstrated the cost of leaving these issues entirely to ad hoc deterrence.

Exhibit 2. The Gulf-Red Sea theatre is now shaped by four interacting arenas

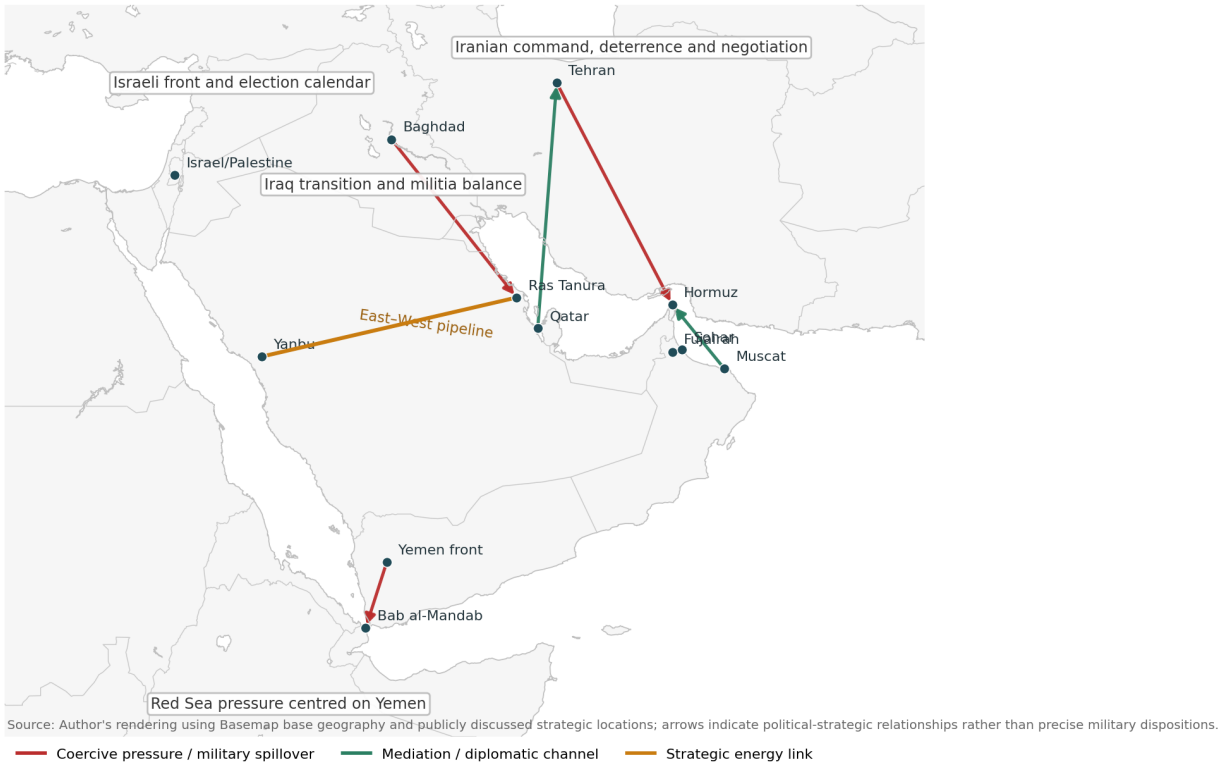


Figure 3. The Gulf-Red Sea theatre as an interacting political-security system.
Note. Author's diagram. Arrows indicate strategic relationships and mediation channels rather than precise military dispositions.

9. Conditional Scenarios: What a Trump Midterm Win or Loss Could Mean for the Iran War

Scenario A assumes that Republicans retain both the House and Senate. The most immediate implication would be continuity in legislative support for the administration's broad strategic direction. War-powers resolutions resembling the measure rejected by the Senate in September would remain difficult to enact. Committee oversight would continue to be controlled largely by the president's party, and appropriations for ongoing operations would be less likely to include restrictive conditions. A retained majority could also facilitate additional sanctions legislation and defence funding requested by the executive branch.

The war itself would not necessarily become more intense under this scenario. Two sub-pathways would remain available. In an escalation pathway, electoral retention could be interpreted by the administration as evidence that the domestic political cost of the war is manageable, enabling further military and economic pressure on Iran. In a negotiation pathway, the same result could be presented as a mandate for bargaining from strength. If Qatar's mediation produced a sequencing formula that reopened Hormuz, constrained specific Iranian activities, and allowed the administration to claim that pressure had yielded concessions, congressional alignment could make implementation easier. The policy implication is therefore

not that a Republican win equals war, but that it reduces legislative friction around whichever strategy the administration chooses.

Scenario B assumes that Democrats win the House while Republicans retain the Senate. Divided congressional control would create a stronger oversight environment without automatically providing the votes needed to enact binding restrictions. House committees could hold hearings, subpoena records, investigate war aims and casualty reporting, and attach conditions to appropriations legislation. Resolutions seeking to constrain hostilities could pass the House more readily, as one already did in 2026, but Senate passage would remain uncertain. This scenario could increase political pressure for a clearer definition of objectives and a timetable for diplomacy.

The foreign-policy effect would depend heavily on presidential response. One possibility would be accelerated negotiation before the new Congress can convert oversight into operational constraints. Another would be greater reliance on executive sanctions and commander-in-chief authorities that do not require new legislation. The risk of institutional confrontation would rise, particularly if the House attempted to condition funding while the executive argued that operations were required for self-defence or protection of allies. Iran might interpret the division as evidence that U.S. endurance is weakening, but such an interpretation could prove mistaken if congressional criticism focused on authorisation rather than on the underlying objective of constraining Iranian capabilities.

Scenario C assumes that Democrats gain the Senate, whether or not the House also changes hands. This would have greater significance for appointments, treaties, and the legislative processing of war-powers measures. A Senate majority more sceptical of the conflict could revisit attempts to require congressional authorisation, impose reporting obligations, or constrain certain operations. The recent 50-49 Senate vote shows why even a small change in composition could matter (Reuters, 2026n). Yet presidential veto power and the constitutional ambiguity surrounding limited uses of force would continue to limit Congress's ability to dictate day-to-day operations.

A broader Democratic congressional victory would increase the likelihood of sustained investigations and appropriations bargaining. It could also alter the political environment surrounding U.S. support for Israel, where partisan differences over Gaza, West Bank settlements, and the scope of military assistance have already become visible (Reuters, 2026m). The U.S.-Israel relationship would remain deep, but disagreements over the sequencing of Iran operations and the acceptability of a negotiated settlement could become more politically consequential. If an alternative Israeli government were formed at the same time, a new configuration of U.S.-Israeli coordination might emerge. If Netanyahu remained in office, sharper congressional-executive disagreement over Israel could complicate the administration's ability to present a unified coalition.

Scenario D concerns the possibility that electoral setback produces short-term escalation rather than restraint. This possibility deserves attention because institutions do not operate only through formal constraints. If the administration believed that operational freedom would be reduced after January, military action could be accelerated before a new Congress is seated. Conversely, the prospect of heightened oversight could encourage the executive to secure a ceasefire rapidly and shift the burden of enforcement toward sanctions, naval monitoring, and Gulf partners. Which response would occur would depend on military assessments and negotiations rather than on the election result alone.

Iran's calculations under each scenario would be similarly complex. A Republican retention outcome could persuade Tehran that waiting for domestic U.S. political change is unlikely to improve its position, strengthening incentives to accept an interim arrangement. It could also convince Iranian leaders that only continued maritime pressure can impose enough domestic cost on Washington to produce concessions. A Democratic congressional gain could be interpreted as an opportunity to delay, particularly if Iranian officials expect Congress to constrain military operations. Such delay would be risky because congressional criticism of presidential war powers does not necessarily translate into willingness to relax sanctions or accept Iranian regional activity.

The Israeli election adds another layer. If a continuity coalition remains in office while Republicans retain Congress, the external appearance of policy continuity would be strong, but disputes over war termination could still persist. If an alternative Israeli coalition is formed while Democrats gain congressional control, a diplomatic opening could emerge around allied coordination and clearer end-state planning, but the new Israeli government could also maintain a demanding position toward Iran in order to establish security credibility. Mixed outcomes would produce more complex bargaining. The institutional combinations matter more than simplistic labels such as “hawkish” and “dovish.”

10. Regional Scenarios for 2027: Beyond Election Day

The conflict's future should be assessed through conditional regional scenarios rather than electoral forecasting. Elections are only one input into a system that also includes the balance of military capabilities, Iranian domestic economics, militia behaviour, Gulf coordination, energy markets, and the credibility of mediation. Four broad trajectories can be identified for 2027.

The first is managed confrontation. Under this trajectory, no comprehensive peace agreement is reached, but the intensity of direct U.S.-Iran military exchange is reduced. Hormuz becomes more navigable through temporary arrangements, escorted transits, or tacit understandings, while sanctions remain severe. Houthi activity continues intermittently around Bab el-Mandeb, and Iraq experiences periodic militia crises after the coalition withdrawal. Qatar and Oman remain active as mediators, but their diplomacy produces issue-specific arrangements rather than a grand bargain. This outcome would resemble a regional cold conflict punctuated by maritime and proxy incidents.

The second trajectory is fragmented escalation. In this pathway, the U.S. withdrawal from Iraq is followed by greater militia autonomy, Israeli-Iranian military exchanges remain intense, and Houthi pressure continues to threaten the Red Sea. Miscalculation rather than deliberate decision could become the principal escalatory mechanism. A drone attack launched from Iraqi territory might be attributed to Iran; a shipping incident could trigger retaliation; or a temporary Gulf arrangement could collapse after an unrelated event in Yemen or Lebanon. Because the theatres are connected politically, local crises would repeatedly threaten wider escalation.

The third trajectory is structured regional de-escalation. This should not be confused with reconciliation. A more realistic arrangement would consist of several limited agreements: rules for commercial navigation, deconfliction channels, reciprocal restraint around Gulf state territory, sequencing of sanctions relief and Iranian maritime concessions, and a framework for discussing proxy activity. Qatar and Oman would be well placed to facilitate such a process, while Saudi Arabia and the UAE would need to support it for implementation to be credible. The

United States would remain the principal external security actor, but the process would be more regionally owned than earlier security architectures.

The fourth trajectory is strategic exhaustion without settlement. Under this pathway, military operations decline because costs become unsustainable rather than because a political agreement is reached. Iran's economy would remain under severe pressure, U.S. and Israeli publics would continue debating war costs, and Gulf states would adapt through redundancy and trade diversification. The conflict would become less intense but more chronic. Such an outcome would institutionalise risk rather than resolve it and would likely keep insurance premiums, defence spending, and sanctions exposure elevated.

The Iraqi variable will be decisive across all scenarios. If the state succeeds in managing militia competition and preserving counter-ISIS coordination, withdrawal may be remembered as a difficult but successful sovereign transition. If militia autonomy expands and Islamic State activity rises, Iraq could become the principal arena through which regional actors pressure one another while avoiding direct interstate war. The difference will be determined by Iraqi institutions, regional restraint, and the continuation of non-combat security cooperation.

The Houthi variable is equally important. A Gulf-Iran understanding that does not address Red Sea insecurity would leave one of the principal transmission belts of the crisis intact. Yet forcing Yemen into a purely Iran-centred analytical framework would also be mistaken. The Houthis possess local political and military objectives and cannot be reduced to a remote-controlled instrument. Any durable maritime framework will therefore require engagement with Yemen's own conflict dynamics as well as Iran's regional strategy.

Table 3. Regional trajectories for 2027 and observable signposts

Trajectory	Core features	Signposts
Managed confrontation	Lower direct U.S.-Iran intensity; partial Hormuz normalisation; sanctions remain; intermittent proxy pressure.	Regular but incomplete shipping recovery; recurring Qatari/Omani mediation; no comprehensive settlement.
Fragmented escalation	More militia autonomy in Iraq; persistent Houthi pressure; repeated local incidents with escalation risk.	Rising drone/missile incidents; interrupted Gulf talks; higher war-risk insurance and renewed shut-ins.
Structured regional de-escalation	Layered agreements on navigation, incident management, sanctions sequencing, and Gulf sovereignty.	Standing deconfliction channels; verifiable maritime arrangements; Saudi/UAE support for regional talks.
Strategic exhaustion	Operations decline from cost and fatigue without a political settlement.	Lower combat tempo but persistent sanctions, high risk premia, and chronic instability.

Note. No probabilities are assigned. The table identifies conditional pathways and monitoring indicators.

11. Policy Implications

First, maritime security arrangements should be designed across theatres rather than chokepoint by chokepoint. A Hormuz arrangement that leaves Bab el-Mandeb or Iraq unaddressed would leave intact the channels through which pressure in one theatre undermines diplomacy in another, as the postponed Gulf-Iran meeting in Oman showed (Reuters, 2026b).

Second, Gulf states would benefit from treating redundancy as a regional rather than exclusively national problem. Pipelines, ports, storage, railways, power networks, desalination, and digital infrastructure increasingly interact across borders. National resilience can be undermined when the surrounding security environment remains fragmented. Saudi-UAE coordination is especially important because the two states possess the region's largest combined capacity to shape logistics, defence, and investment. Recent high-level engagement suggests that the strategic incentive for renewed coordination has strengthened (Reuters, 2026j).

Third, the role of Qatar and Oman should be institutionalised where possible. Mediation becomes fragile when it depends entirely on personal relationships or improvised crisis channels.

A small standing mechanism for maritime deconfliction, hosted or co-facilitated by neutral Gulf actors, could provide technical communication even when political relations deteriorate. Such a mechanism would not require recognition of competing territorial claims or acceptance of a comprehensive security pact. Its initial function could be limited to incident notification, vessel safety, search and rescue, and crisis communication.

Fourth, the Iraqi transition requires sustained non-combat support. Withdrawal from a coalition mission should not be equated with strategic disengagement. Training, intelligence sharing, border security, air-defence support, and Baghdad-Erbil coordination can reduce the likelihood that non-state actors exploit gaps. Assistance should be designed to strengthen Iraqi state institutions rather than create permanent dependence or parallel chains of command.

Fifth, U.S. war policy would benefit from clearer articulation of objectives under either congressional-control scenario. The constitutional debate over authorisation will continue, but strategic ambiguity about what constitutes success creates operational and diplomatic problems. If the objective is to prevent specific Iranian military capabilities, protect navigation, and secure verifiable constraints, those goals should be distinguished from regime change or indefinite punishment. A clearer end-state would improve bargaining and reduce the risk that tactical military achievements become disconnected from political strategy.

Sixth, Israeli war aims should similarly be linked to achievable regional outcomes. Continued military pressure can alter capabilities but cannot by itself design the post-war regional order. Whether the October election produces continuity or political change, the next Israeli government will have to define how deterrence toward Iran relates to relations with Gulf states, the United States, Europe, and the Palestinian arena. The more these theatres are merged into a single unlimited security agenda, the more difficult coalition management becomes.

Seventh, the economic policy response should be treated as part of national security. Strategic petroleum reserves, LNG diversification, fertiliser inventories, shipping insurance, and industrial stockpiles have already played stabilising roles. The IEA's unprecedented 400-million-barrel release demonstrated the value of coordinated reserves (IEA, 2026). Yet emergency stocks are finite and cannot substitute indefinitely for restored supply. Governments should therefore distinguish between short-duration buffers and structural adaptation.

12. Conclusion

The 2026 Gulf-Red Sea crisis began as a dramatic demonstration of maritime vulnerability, but it has evolved into a wider contest over regional order. Hormuz and Bab el-Mandeb remain central to the analysis because they transmit economic consequences across the world. Yet the decisive variables in late 2026 are increasingly institutional and political: elections in the United States and Israel, the end of the U.S.-led coalition mission in Iraq, the persistence of Iranian and Houthi pressure, and the emergence of Qatar and Oman as central mediating actors.

The Iraqi withdrawal may prove to be the most important structural development of all. If sovereignty is consolidated and militia autonomy is contained, a more stable regional equilibrium could emerge. If security functions fragment, Iraq could become a central arena for proxy competition after the reduction of direct U.S. presence. The future of the region will be shaped in part by whether this transition produces institutional consolidation or competitive vacuums.

Qatar and Oman provide the principal diplomatic counterweight to these risks. Their value lies not in the ability to impose a settlement but in the capacity to preserve communication when

direct negotiation is politically difficult. A durable post-war order is unlikely to emerge from a single comprehensive bargain. More plausibly, it would be constructed through layered agreements on navigation, sanctions sequencing, proxy restraint, incident management, and regional sovereignty.

The analytical implication is therefore broader than the current war. Chokepoints should no longer be treated only as sites where trade can be interrupted. They should also be understood as political transmission belts through which domestic elections, regional rivalries, military deployments, and diplomatic initiatives are converted into global economic consequences. The future of Gulf security will depend not merely on keeping sea lanes open, but on building institutions capable of governing the political pressures that repeatedly threaten to close them.

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