

We need a regional agreement for the Strait of Hormuz



A governing arrangement for the strait can and must be developed based on law and fact.

The announcement of a ceasefire by United States President Donald Trump on Tuesday has brought some relief to the Gulf region, seafarers and the energy markets. Iran has agreed to open the Strait of Hormuz for commercial traffic as long as vessels coordinate movements with its authorities.

Irrespective of what happens next – whether a durable peace deal is negotiated or hostilities resume – the global misery caused by Iran’s closure of the strait demonstrates a clear need for long-term solutions that are solidly rooted both in law and in fact.

No one has a greater stake in such solutions than Iran and its Arab neighbours. They all use the strait to reach customers

worldwide and to feed their own people. Now, they will have not only to repair wartime damage, but also to restore international confidence in the world's most critical waterway.

An international legal framework

Fortunately, for all concerned, the would-be participants in this diplomatic exercise will find that much of the work has already been done. Since its foundation in 1945, the United Nations has led a series of processes aimed at reducing the scope for conflict between nations, and few of these have been more significant than the UN Convention on the Law of the Sea.

The International Maritime Organization (IMO), the 1958 Convention on the Territorial Sea and the Contiguous Zone, the 1969 Vienna Convention on the Law of the Treaties, and the 1982 United Nations Convention on the Law of the Sea (UNCLOS) all provide a legal framework for marine and maritime activities, including the rules and the science required to delimit fair and equitable borders at sea.

They also set out rules governing transit passage through straits, stating that "all ships and aircraft enjoy the right of transit passage, which shall not be impeded", and no exceptions apply to the Strait of Hormuz.

Although these treaties and conventions do not resolve all territorial or sovereignty issues, a process left to duly formed international courts and tribunals, their legal and scientific standards have largely been accepted as part of customary international law by those same courts.

There is more. Under the international law of treaties, as codified in the Vienna Convention on the Law of Treaties, a country (such as Iran) that has signed but not ratified a treaty is nonetheless obligated to "refrain from acts that would defeat the object and purpose of a treaty that it has

signed pending the ratification process”.

This rule is also generally considered as declaratory, meaning that it is also binding on any country that has signed but not ratified the Vienna Convention itself (absent its consistent objection).

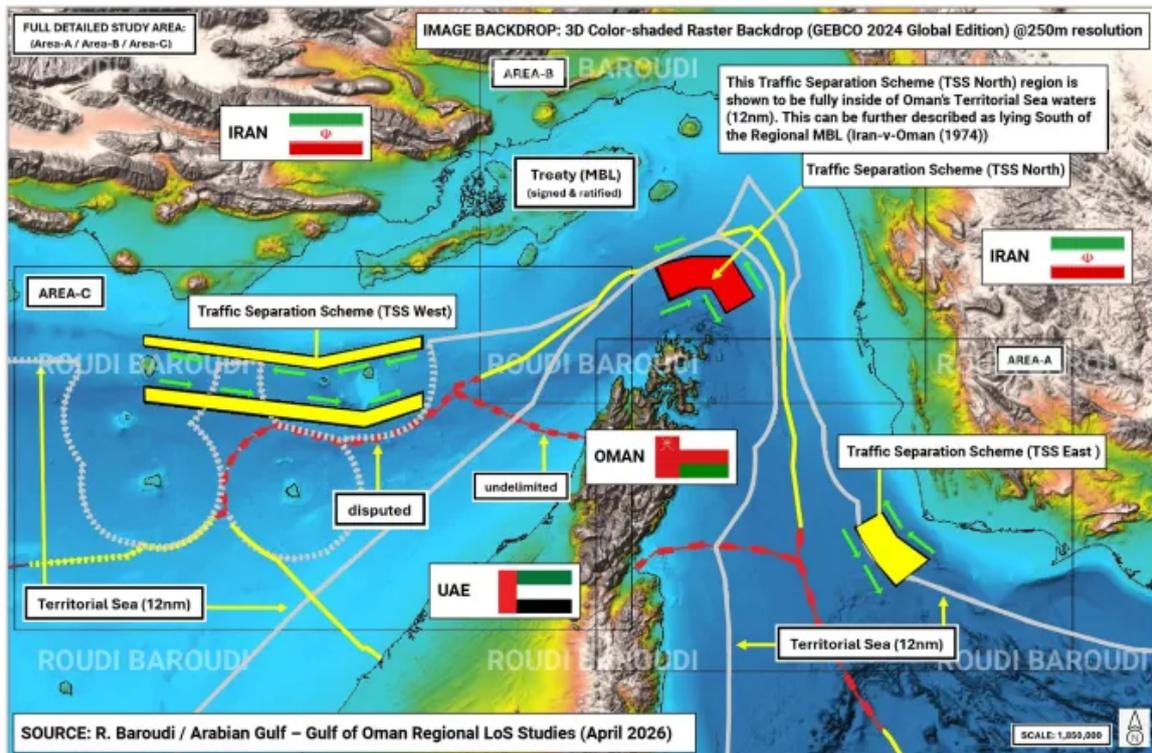
No ‘right’ to close the strait

Traffic in the strait is regulated by a Traffic Separation Scheme (TSS) established by the IMO. The TSS in the Strait of Hormuz comprises a separation zone and two traffic lanes for, respectively, westbound and eastbound traffic in the strait.

These special sea lanes are mandatory for merchant vessels transiting the strait. Iran and Oman, which lie on the northern and southern coasts of the strait, respectively, are both IMO member states and, as such, must respect the IMO-mandated shipping lanes in the Hormuz passage.

This area within the Strait of Hormuz (north of the Musandam Peninsula), including the mandatory TSS shipping lanes (depicted in the map below), lies entirely in the territorial waters of Oman, as established through the maritime boundary line agreed in the Iran-Oman treaty of July 25, 1974.

HORMUZ EMPIRICAL MAP: ECONOMIC, LEGAL, AND SCIENTIFIC ANALYSIS



[Courtesy of Roudi Baroudi]

Given that Oman has signed and ratified the UNCLOS, its free transit passage regime applies to its waters and any user state that has ratified the UNCLOS. In this sense, Iran has no jurisdiction over this area in the Strait of Hormuz, as an IMO member state that has signed but not ratified the UNCLOS.

The western end of the strait, where it opens up to traffic inside the Gulf, includes special shipping lanes subject to a mandatory TSS established by the IMO, which are divided into inbound (north) and outbound (south) lanes. Both of these lanes, which are separated by islands, are situated partly in what Iran claims as its waters and partly in undelimited waters disputed between Iran and the United Arab Emirates, as per the Iran-UAE continental shelf agreement of August 31, 1974.

The area used for international shipping lies near the disputed islands Abu Musa and the Greater and Lesser Tunbs. None of this removes or diminishes Iran's obligation to refrain from interfering or threatening to interfere with

those IMO shipping lanes.

The imposition of levies by a state bordering an international strait on vessels passing through it would be incompatible (even illegal) with both the “transit passage” regime under UNCLOS and the “innocent passage” regime under customary international law.

Moving forward

The significance of energy transit choke points through narrow channels cannot be overstated. As one-half of the world’s crude oil supply relies on maritime transportation, protecting the free flow of oil and gas through maritime shipping routes is crucial for global energy price stability and security.

There is an urgent need for durable solutions which necessitate immediate dialogue and diplomacy. As the symbol of the current rules-based order, the United Nations should play a central role in resolving the current situation. Whatever format this process assumes, it should be based on existing international legal provisions and should uphold the rights of all states involved.

The potential gains and benefits of resolving this situation far outweigh any “achievements” perceived in the ongoing disruption of the free passage in the Strait of Hormuz. We all need peace.

The views expressed in this article are the author’s own and do not necessarily reflect Al Jazeera’s editorial stance.



Roudi Baroudi

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Open Letter to H.E. António Guterres, Secretary-General of the United Nations



By Roudi Baroudi

Dear Secretary-General Guterres,

I write to thank you for your efforts to bring about a ceasefire in the current conflict pitting the United States and Israel against Iran, to applaud your calls for civilians to be protected, and to urge you in the strongest possible terms to expand and intensify these efforts with all of the

tools at your disposal.

People are already dying in countries that have little or nothing to do with the conflict, devastating socioeconomic consequences are spreading around the globe, and conditions can only get worse if current trends continue.

It was inevitable that any prolonged hostilities so close to the Strait of Hormuz would cause energy prices to go up, at least temporarily, because insurance rates would rise at the increased risk of an errant missile or two hitting a supertanker. But that is not what has happened here. Instead, just three weeks into the fighting, the strait is effectively closed to shipping, and global markets for oil and gas are undergoing the worst supply disruption in history. Prices are up sharply, and it will be months or even years before they return to previous levels.

The rapid escalation of the situation has not been due to chance; rather, it is because Iran threatened to directly target shipping in the strait, and several vessels have come under deliberate fire from its forces. These are risks to which most shipping companies will not subject their crews and hulls under any circumstances, not least when the cargo is something as volatile as oil or liquified natural gas (LNG).

Ergo, the strait is closed, meaning that roughly one-fifth of the world's oil and LNG can no longer reach market, and therefore that two pillars of global economic stability – affordable transport and affordable electricity – are becoming increasingly brittle. In addition, significant percentages of the global trade in other key commodities, including fertilizers, aluminum, helium, polymers, and various forms of chemical feedstock. These are essential to myriad industries everywhere, and to the jobs they provide, everything from agriculture, construction, pharmaceuticals, and food processing to clothing, footwear, heavy industry, and the latest digital technologies.

Even these obstacles could have been overcome, provided the disruption did not persist for too long. And indeed, early releases of strategic oil reserves by the United States (172 million barrels) and members of the International Energy Agency (400 million barrels) initially helped to calm markets when they were announced. This effect soon began to wear off, however, when markets realized that those releases amount to only about a month of usual Hormuz traffic. The United States then found two other cards to play by temporarily “de-sanctioning” Russian oil and an estimated 140 million barrels of Iranian crude currently held in floating storage, helping to alleviate the supply gap and reducing upward pressure on prices.

Sadly, we are beyond that point as well. After Israel attacked Iranian infrastructure associated with the latter’s South Pars gasfield (part of the world’s single largest field and shared with Qatar), Iran’s response was not just to attack Israel’s largest refinery: it also lashed out at energy production and export facilities in several of its Arab neighbors. Refineries, LNG plants, and other assets have now been damaged or destroyed in all six member-states of the Gulf Cooperation Council, which groups Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the United Arab Emirates.

I stress here that each of the GCC states is also a full member of the United Nations, and several of them count among the world’s most prolific providers of relief and development assistance, both via UN bodies and through their respective overseas development agencies.

This loss of production capacity constitutes an exponential worsening of the situation, for even if Hormuz were to reopen tomorrow, there is no way to fully compensate for the oil, gas, and other products that have been taken off the market. Delay alone is costly and disruptive, but the destruction of production capacity constitutes a massive step-change because much of it simply cannot be replaced any time soon.

In some cases, repairs may take weeks or months, but others entail more lasting impacts. QatarEnergy says the damage at Ras Laffan, for example, has taken 17% of Qatar's national LNG capacity offline – and that it will take two or three years to repair. Qatar is the world's leading exporter of that product, so a long period of elevated gas prices is unavoidable. Of course, several countries have new LNG capacity at various stages of design or construction, including Qatar itself, plus the US, Australia, and Canada. These will help, of course, but not with the current price surge, and even when they do come online, much of their output will already be accounted for.

Mr. Secretary-General,

As catastrophic as these setbacks are, they pale in comparison to what awaits billions of people if current trends continue.

First, consider the GCC countries themselves. They did not ask for this war, several of them expended considerable diplomatic effort trying to prevent it, and yet they are incurring enormous physical and economic damage, not to mention the lives and livelihoods lost. Much of the focus has been on what is no longer coming out of the Gulf, but the GCC states also

have to worry what is no longer coming in: this includes most of their food and other essential products, and virtually all of their cars, computers, televisions, and industrial machinery. Of course they can arrange alternative delivery routes, but that will impose significantly higher costs for virtually everything – a burden that will be particularly onerous for the millions of migrant laborers who live in the GCC countries.

These same countries have shown remarkable restraint (thus far) by not retaliating for Iranian missile and drone strikes, but the recent meeting of Arab foreign ministers in Riyadh signaled that this patience is not infinite. These countries cannot be expected to remain on the receiving end of so much underserved devastation without responding in kind, and if and when that happens, the global supply crisis is liable to get even worse.

I stress here that the vast majority of all countries also are members of the United Nations, and many of them are likewise generous contributors to the UN and the developing world. Even many of the poorer ones have made enormous sacrifices in the name of international peace and security, often by sending their troops to act as peacekeepers in some of the world's most dangerous hotspots.

The interests of all 193 UN member-states are at stake in this war, and most them are looking to the UN for help, guidance, and leadership.

Mr. Secretary-General,

The United Nations is the most important institution in the world today, even and perhaps especially because it has become so fashionable to denigrate it, and because some governments seek to undermine it at every turn. Above all else, the UN was established to prevent war when it can, and to alleviate the resulting human suffering when it cannot. Its ability to do either of these things is being sorely tested these days, particularly since many governments view the rules of the international system as hindrances to be bulldozed or ignored.

Like all supporters of a rules-based order, I recognize that the realities of great-power politics sometimes make it impossible for the UN to impose solutions consistent with both international law and the often nebulous but always noble notion of collective security. But now is no time to accept failure, not when we know that the effects of the current war are going to reach into so many homes around the world, and that this will take place by design.

The United Nations still has options because its remit includes the day-to-day handling of incidents, joint activities, and other interactions that take place between member-states. As such, it is the custodian of several specialized agencies and treaties relating to various aspects of maritime law in peace- and wartime alike, including the International Maritime Organization (IMO) established in 1948, the 1969 Vienna Convention on the Law of Treaties, and the 1982 UN Convention on the Law of the Sea (UNCLOS).

These agencies regulate and otherwise provide a level playing field for all manner of international interactions, and their

responsibilities are not suspended during wartime. On the contrary, the UN's work is never more vital than after the shooting starts, especially when the intended targets of the war's negative impacts include everyone, everywhere.

The duty to protect civilians during armed conflict is a universal and overriding one, and while many belligerents harm civilians and their interests by accident, Iran's actions deliberately target the welfare of civilians around the world. The United Nations is the ultimate forum for the resolution of disputes great and small, and even when governments choose to ignore it, the UN remains bound by its Charter to seek peace and security.

Most importantly, never stop reminding the belligerents of their obligations under the UN Charter, particularly when they fail to live up to them. Call out Iran for inter alia, having illegally interfered in the innocent transit of civilian shipping, which is specifically protected within straits, even in wartime, by IMO & UNCLOS – and therefore for weaponizing energy and turning it on the whole world.

Diplomacy takes place on multiple levels, from public statements and backchannel communications to purely procedural exchanges and informal trust-building exercises. In the current circumstances, given how many people are being affected, no stone can be left unturned in convincing Iran to stop choking out the global economy, or in convincing its opponents to cease fire.

Finally, I would note that when the belligerents are unwilling to consider dialogue or other alternatives to conflict, that is precisely when the good offices and moral authority of the United Nations are needed most. Now is no time to let them fight it out, not when the welfare of billions of people is at stake.

Sincerely,

Roudi Baroudi

رسالة مفتوحة إلى سعادة الأمين
العام للأمم المتحدة السيد
، أنطونيو غوتيريش المحترم



سعادة السيد أنطونيو غوتيريش

، الأمين العام للأمم المتحدة

الولايات المتحدة الأمريكية 10017 NY ، نيويورك

مارس 2026 22

رسالة مفتوحة إلى سعادة الأمين العام للأمم المتحدة السيد أنطونيو
، غوتيريش المحترم

رسالة إلى الأمين العام للأمم المتحدة: تحركوا الآن قبل فوات
• الأوان... إغلاق هرمز... بداية أزمة قد تغير العالم

، حضرة الأمين العام

أكتب إليكم لأعرب عن شكري لجهودكم الرامية إلى التوصل إلى وقف
لإطلاق النار في النزاع الحالي بين الولايات المتحدة وإسرائيل من
جهة وإيران من جهة أخرى، ولأثني على دعواتكم لحماية المدنيين،
ولأحثكم بأشد العبارات على توسيع هذه الجهود وتكثيفها باستخدام
جميع الأدوات المتاحة لديكم.

الناس يموتون بالفعل في دول لا علاقة لها تُذكر بالنزاع، كما أن

التداعيات الاجتماعية والاقتصادية المدمرة تنتشر في جميع أنحاء العالم، ولا يمكن للأوضاع إلا أن تزداد سوءًا إذا استمرت الاتجاهات الحالية.

كان من الحتمي أن تؤدي أي أعمال عدائية مطوّلة بالقرب من مضيق هرمز إلى ارتفاع أسعار الطاقة، ولو بشكل مؤقت، بسبب زيادة تكاليف التأمين نتيجة ارتفاع مخاطر إصابة ناقلات النفط العملاقة بصواريخ طائشة. لكن هذا ليس ما حدث مع هذه الحرب. فبعد ثلاثة أسابيع فقط من اندلاع القتال، أصبح المضيق مغلقًا فعليًا أمام الملاحة، وتواجه الأسواق العالمية للنفط والغاز أسوأ اضطراب في الإمدادات في التاريخ. ما أدى إلى ارتفاع الأسعار بشكل حاد، ومن المرجح أن يستغرق الأمر شهرًا أو حتى سنوات قبل أن تعود إلى مستوياتها السابقة.

إن التصعيد السريع للوضع لم يكن نتيجة للصدفة؛ بل جاء نتيجة تهديد إيران باستهداف الملاحة في المضيق بشكل مباشر، وقد تعرضت عدة سفن بالفعل لنيران متعمدة من قبل قواتها. وهذه المخاطر لا تقبل معظم شركات الشحن تعريض طواقمها وسفنها لها تحت أي ظرف، لا سيما عندما تكون الحمولة مواد شديدة الحساسية مثل النفط أو الغاز الطبيعي المسال.

نتيجة لذلك، أصبح المضيق مغلقًا، ما يعني أن نحو خمس إمدادات النفط والغاز الطبيعي المسال في العالم لم تعد تصل إلى الأسواق، وهو ما يؤدي إلى تآكل ركيزتين أساسيتين من ركائز الاستقرار الاقتصادي العالمي، وهما النقل العادي التكلفة والكهرباء ذات التكلفة العادية. وإضافة إلى ذلك، فإن نسبة كبيرة من التجارة العالمية من سلع أساسية أخرى- بما في ذلك الأسمدة، والألمنيوم، والهيليوم، والبوليمرات، ومختلف المواد الكيميائية الأولية - تتأثر أيضًا. ومن المعروف إن هذه مواد أساسية لعدد لا يحصى من الصناعات حول العالم، وللوظائف التي توفرها، بدءًا من الزراعة والبناء والصناعات الدوائية وتصنيع الأغذية، وصولاً إلى الملابس والأحذية والصناعات الثقيلة وأحدث التقنيات الرقمية.

كان من الممكن التغلب على هذه العقبات، لو لم يستمر هذا الاضطراب لفترة طويلة. وبالفعل، ساهمت عمليات الإفراج المبكرة عن الاحتياطات النفطية الاستراتيجية من قبل الولايات المتحدة (172 مليون برميل) وأعضاء وكالة الطاقة الدولية (400 مليون برميل) في تهدئة الأسواق في البداية. غير أن هذا التأثير بدأ يتلاشى عندما

أدركت الأسواق أن هذه الكميات لا تعادل سوى نحو شهر واحد من حركة المرور المعتادة عبر مضيق هرمز. ثم لجأت الولايات المتحدة إلى خيارين إضافيين تمثلا في تخفيف مؤقت للعقوبات على النفط الروسي، والسماح بطرح نحو 140 مليون برميل من النفط الإيراني المخزن عائمًا، ما ساهم في تقليص فجوة الإمدادات والحد من الضغوط التصاعديّة على الأسعار.

ومع الأسف، فقد تجاوزنا هذه المرحلة أيضًا. فبعد أن استهدفت إسرائيل بنى تحتية إيرانية مرتبطة بحقل غاز جنوب فارس (وهو جزء من أكبر حقل غاز في العالم ويُشترك فيه مع قطر)، لم يقتصر رد إيران على مهاجمة أكبر مصفاة في إسرائيل، بل امتد ليشمل استهداف منشآت إنتاج وتصدير الطاقة في عدد من جيرانها العرب. وقد تعرضت مصافي ومنشآت للغاز الطبيعي المسال وغيرها من الأصول للتدمير أو الأضرار في جميع الدول الست الأعضاء في مجلس التعاون لدول الخليج العربي، وهي البحرين والكويت وعمان وقطر والمملكة العربية السعودية والإمارات العربية المتحدة.

أود التأكيد هنا أن جميع دول مجلس التعاون همي أيضًا أعضاء كاملة في الأمم المتحدة، وأن عددًا منها يُعد من أبرز مقدمي المساعدات الإنسانية والتنمية في العالم، سواء عبر هيئات الأمم المتحدة أو من خلال وكالاتها التنموية.

إن فقدان هذه القدرات الإنتاجية يمثل تدهورًا متسارعًا وخطيرًا للوضع؛ فحتى لو أُعيد فتح مضيق هرمز غدًا، فلن يكون بالإمكان تعويض كامل كميات النفط والغاز وغيرها من المنتجات التي خرجت من السوق. فالتأخير وحده مكلف ومُربك، لكن تدمير القدرة الإنتاجية يمثل تحولًا جذريًا، لأن الكثير منها لا يمكن استبداله في وقت قريب.

وفي بعض الحالات، قد تستغرق الإصلاحات أسابيع أو أشهرًا، لكن في حالات أخرى تكون التأثيرات طويلة الأمد. فعلى سبيل المثال، أفادت شركة قطر للطاقة بأن الأضرار التي لحقت بمنشآت رأس لفان أدت إلى توقف 17% من القدرة الوطنية لإنتاج الغاز الطبيعي المسال، وأن إصلاحها قد يستغرق عامين إلى ثلاثة أعوام. ونظرًا لأن قطر هي أكبر مصدر عالمي للغاز الطبيعي، فإن فترة طويلة من ارتفاع أسعار الغاز أصبحت أمرًا لا مفر منه. وبالطبع، هناك دول عدة تعمل على تطوير قدرات جديدة في هذا المجال، مثل قطر نفسها والولايات المتحدة وأستراليا وكندا، غير أن هذه المشاريع لن تُسهم في معالجة الأزمة الحالية، وحتى عند دخولها الخدمة، سيكون جزء كبير من إنتاجها قد

. تم التعاقد عليه مسبقاً .

، حضرة الأمين العام

على الرغم من جسامه هذه التحديات، فإنها تبدو ضئيلة مقارنة بما قد يواجه مليارات البشر إذا استمرت الاتجاهات الحالية .

ففي المقام الأول، ينبغي النظر إلى دول مجلس التعاون نفسها . فهي لم تطلب هذه الحرب، وقد بذلت عدة دول منها جهوداً دبلوماسية كبيرة لمنعها، ومع ذلك تتكبد أضراراً مادية واقتصادية جسيمة، فضلاً عن الخسائر في الأرواح وسبل العيش. وبينما ينصب التركيز على ما لم يعد يخرج من الخليج، فإن هذه الدول تواجه أيضاً مشكلة في ما لم تعد تستطيع استيراده، بما في ذلك معظم احتياجاتها من الغذاء والسلع الأساسية، وكذلك معظم السيارات والحواسيب وأجهزة التلفاز والآلات الصناعية. بإمكانها بالطبع إيجاد طرق بديلة للإمداد، لكن ذلك سيؤدي إلى ارتفاع كبير في التكاليف، وهو عبء سيكون أشد وطأة على ملايين العمال الوافدين المقيمين في هذه الدول .

أظهرت هذه الدول حتى الآن قدرًا كبيرًا من ضبط النفس بعدم الرد على الهجمات الصاروخية والطائرات المسيّرة الإيرانية، إلا أن الاجتماع الأخير لوزراء الخارجية العرب في الرياض أشار إلى أن لهذا الصبر حدودًا . ولا يمكن توقع استمرار هذه الدول في تحمل هذا القدر من الدمار دون رد، وإذا حدث ذلك، فمن المرجح أن تتفاقم أزمة الإمدادات العالمية .

كما أؤكد هنا أن الغالبية العظمى من دول العالم هي أيضاً أعضاء في الأمم المتحدة، وأن العديد منها يسهم بسخاء في دعمها ودعم الدول النامية. بل إن حتى الدول الأقل دخلاً قدمت تضحيات كبيرة في سبيل السلم والأمن الدوليين، من خلال إرسال قواتها للمشاركة في مهام حفظ السلام في أكثر مناطق العالم خطورة .

إن مصالح جميع الدول الأعضاء الـ 193 في الأمم المتحدة على المحك في هذه الحرب، ومعظمها يتطلع إلى الأمم المتحدة طلباً للمساعدة والتوجيه والقيادة .

، حضرة الأمين العام

تُعد الأمم المتحدة أهم مؤسسة في العالم اليوم، وربما بشكل خاص

بسبب ما تتعرض له من انتقادات ومحاولات تقويض، فقد أُنشئت أساسًا لمنع الحروب متى أمكن، وللتخفيف من معاناة البشر عندما يتعذر ذلك. واليوم، تواجه قدرتها على أداء هذين الدورين اختبارًا صعبًا، خاصة في ظل تجاهل بعض الحكومات قواعد النظام الدولي.

ومثل غيري من الداعمين لقيام نظام قائم على القواعد، أدرك أن واقع سياسات القوى الكبرى قد يجعل من الصعب على الأمم المتحدة فرض حلول تتوافق تمامًا مع القانون الدولي ومفهوم الأمن الجماعي. لكن هذا ليس وقت الاستسلام، لا سيما وأن آثار هذه الحرب ستطول عددًا هائلًا من البشر حول العالم.

ولا تزال لدى الأمم المتحدة خيارات، نظرًا لمسؤولياتها في إدارة التفاعلات اليومية بين الدول الأعضاء، بما في ذلك عبر وكالاتها المتخصصة والاتفاقيات المتعلقة بالقانون البحري، مثل المنظمة البحرية الدولية، واتفاقية فيينا لقانون المعاهدات لعام 1969، واتفاقية الأمم المتحدة لقانون البحار لعام 1982.

هذه الهيئات تنظم التفاعلات الدولية حتى في أوقات الحرب، من المعروف أن دور الأمم المتحدة يصبح أكثر أهمية بعد اندلاع النزاعات، خاصة عندما تمتد آثارها بشكل واسع.

إن حماية المدنيين أثناء النزاعات المسلحة واجب عالمي لا يقبل التهاون، وبينما تقع أضرار على المدنيين أحيانًا بشكل غير مقصود، فإن بعض الأفعال تستهدفهم عمدًا. وتظل الأمم المتحدة المنصة الأهم لحل النزاعات، وهي ملزمة بالسعي لتحقيق السلم والأمن.

والأهم من ذلك، يجب عدم التوقف عن تذكير أطراف النزاع بالتزاماتهم بموجب ميثاق الأمم المتحدة، لا سيما عند الإخلال بها. كما يجب إدانة أي تدخل غير قانوني في حرية الملاحة المدنية، خصوصًا في المضائق الدولية، وتحويل الطاقة إلى أداة ضغط على العالم.

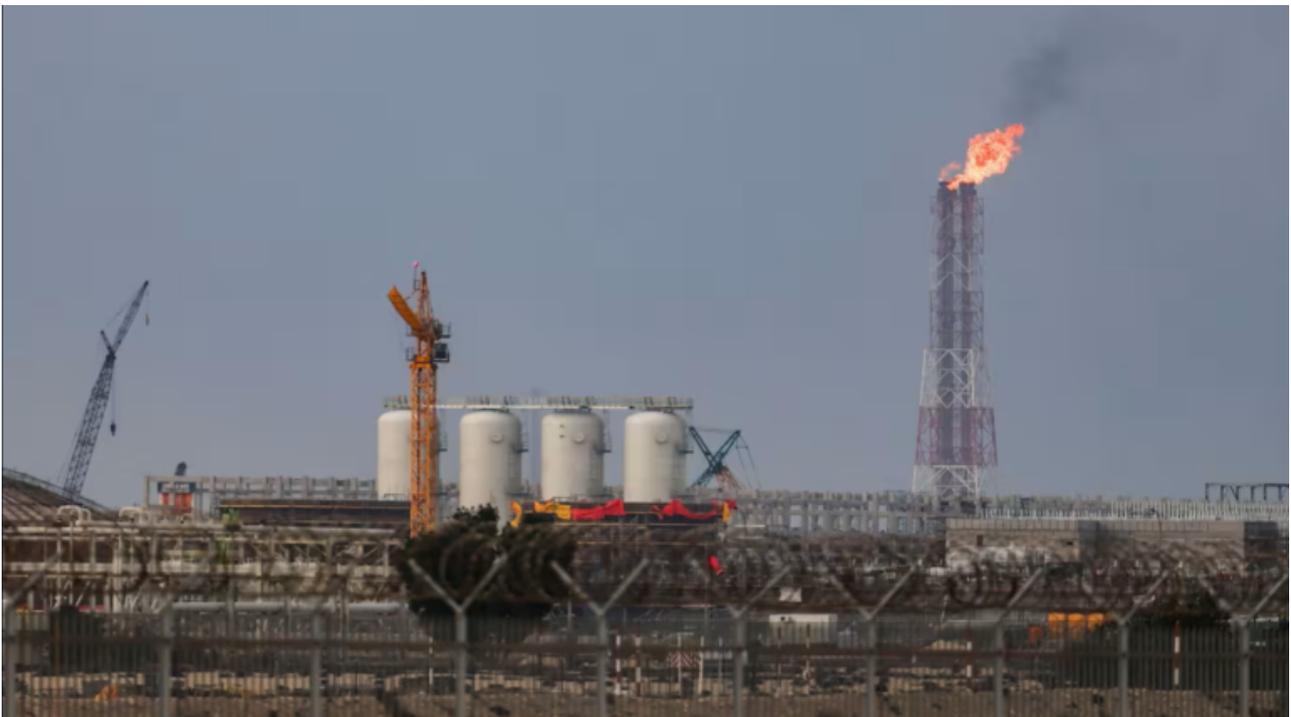
إن الدبلوماسية تتم على مستويات متعددة، من التصريحات العلنية إلى القنوات الخلفية، وفي ظل الظروف الحالية، لا بد من استخدام كل الوسائل الممكنة لإقناع الأطراف بوقف التصعيد.

وأخيرًا، فإن اللحظة التي يرفض فيها المتحاربون الحوار هي تحديدًا اللحظة التي تبرز فيها أهمية دور الأمم المتحدة وسلطتها الأخلاقية. وليس من المقبول ترك النزاع يتفاقم بينما مصير مليارات البشر على المحك.

Qatar warns war will force Gulf to stop energy exports 'within days'

Qatar's energy minister has warned that war in the Middle East could "bring down the economies of the world", predicting that all Gulf energy exporters would shut down production within weeks to months to restore deliveries

Qatar warns war will force Gulf to stop energy exports 'within days'



Brent crude tops \$90 after gas producer says it will take 'weeks to months' to restore deliveries

Qatar's energy minister has warned that war in the Middle East could "bring down the economies of the world", predicting that all Gulf energy exporters would shut down production within

days and drive oil to \$150 a barrel. Saad al-Kaabi told the FT that even if the war ended immediately it would take Qatar “weeks to months” to return to a normal cycle of deliveries following an Iranian drone strike at its largest liquefied natural gas plant. Qatar, the world’s second-largest producer of LNG, was forced to declare force majeure this week after the strike at its Ras Laffan plant. While Qatar only exports a small proportion of its gas to Europe, the energy minister said the continent would feel significant pain as Asian buyers outbid Europeans for whatever gas is available on the market, and as other Gulf countries find themselves unable to meet their contractual obligations. “Everybody that has not called for force majeure we expect will do so in the next few days that this continues. All exporters in the Gulf region will have to call force majeure,” Kaabi said. “If they don’t, they are at some point going to pay the liability for that legally, and that’s their choice.” Kaabi’s comments reflect rising concern in the Gulf about the economic repercussions of the US and Israel’s war with Iran, which has wreaked havoc across the oil-rich region. Brent crude rose 5.5 per cent to \$90.13 a barrel on Friday following the publication of this article, the highest level since the start of the conflict. European gas prices gained 5 per cent, but were still below this week’s peak. “This will bring down the economies of the world,” Kaabi said. “If this war continues for a few weeks, GDP growth around the world will be impacted. Everybody’s energy price is going to go higher. There will be shortages of some products and there will be a chain reaction of factories that cannot supply.” He said while there had been no damage to Qatar’s offshore operations, the aftermath onshore was still being reviewed. “We don’t yet know the extent of the damage, as it is currently still being assessed. It is not clear yet how long it will take to repair,” he said.

Qatar’s \$30bn development to increase production capacity at its vast North Field gasfield from 77mn to 126mn tonnes a year by 2027 would also be delayed, he added. The first production

was to begin in the third quarter of this year. "It will delay all our expansion plans for sure," Kaabi said. "If we come back in a week, perhaps the effect is minimal; if it's a month or two, it is different." Saudi Arabia and the UAE both have pipelines that can redirect a portion of their oil exports to be loaded at ports outside the Strait, but significant production volumes remain trapped. He forecast that crude prices could soar to \$150 a barrel in two to three weeks if tankers and other merchant vessels were unable to pass through the Strait of Hormuz, a key maritime trade route through which a fifth of the world's oil and gas passes. He predicted that gas prices would rise to \$40 per million British thermal units (£117 per MWh) – almost four times the level they were before the war began. He added that the impact of the disruption of maritime trade through the strait would reverberate far beyond energy markets and hit multiple industries as the region produces much of the world's petrochemicals and fertiliser feedstocks. Traffic through the waterway has slowed to a halt since the US and Israel launched their attack on Iran on Saturday. At least 10 ships have been hit, insurance premiums have soared and shipping owners have been unwilling to risk their vessels and crews. US President Donald Trump and Israeli officials have warned that the war could last weeks as they seek to destroy the Islamic regime. Trump said this week that the US navy will escort ships through the strait and has offered to provide additional insurance to shipping companies. But Kaabi said it would still be unsafe for vessels to pass through the strait, which is just 24 miles wide at its narrowest point and traces the Iranian coastline, as long as the war was ongoing. "The way that we are seeing the attacks, bringing ships into the strait . . . it's too dangerous. It's too close to the shore to bring ships in. It will be difficult to convince ships to go in," he said. "Most of the ship owners will see that they become a bigger target because they're [Iran] targeting the military ships." Kaabi added: "In addition to energy, there will be a halt on all other trade in between the [Gulf] and the world, which will have a

significant effect on the economies of the [Gulf] and all the trading partners around the world.” Qatar, which hosts the biggest American military base in the region, has traditionally had good relations with Iran. But the Islamic republic has fired multiple barrages of missiles and drones at it and other Gulf states as Tehran sought to raise the stakes for the US by targeting energy facilities, airports, American bases and embassies.

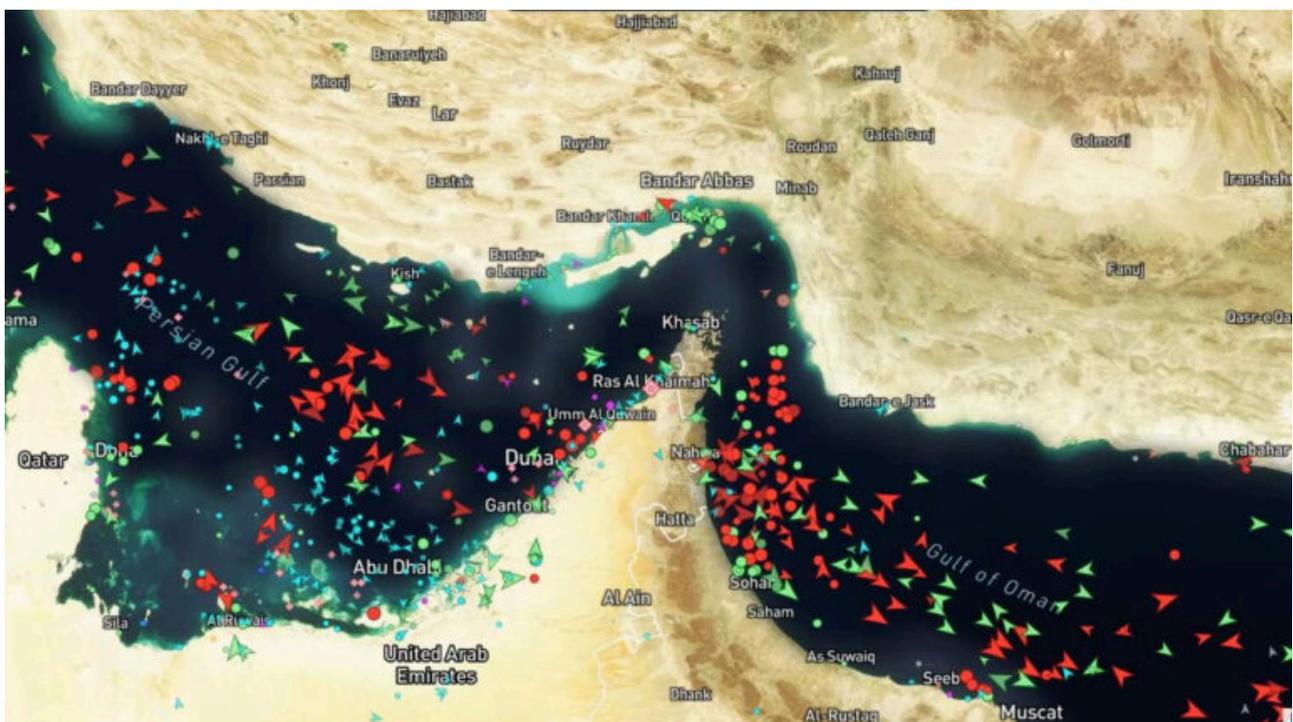
Kaabi, who is also chief executive of QatarEnergy, said the company had no choice but to declare force majeure after Ras Laffan was hit in an Iranian drone attack on Monday. He cited safety reasons, adding that the company’s offshore facilities were also facing the threat of attack, although they were not damaged. “We were actually informed by our military that there is an imminent threat on the facilities offshore. So we shut down operations safely, as safely as we can, and we mobilised around 9,000 people in 24 hours and brought them back,” he said. “When we have our people in danger and we’re actually being hit in a military zone and we can’t work anymore, and we can’t put our people in harm’s way, we have to declare force majeure.” Production in Qatar will not restart until there is a complete cessation of hostilities, he said. “So the signal is when our military says there is a complete stop of hostilities and we are not being attacked anymore,” Kaabi said. “We are not going to put our people in harm’s way.”

After the restart, he predicted huge logistical issues on top of the restoration of the machinery that cools and compresses gas into liquid that can be shipped. “Our ships are all over the place,” he said, adding that only six or seven out of Qatar’s fleet of 128 tankers were at hand. “Each ship takes a day or two and you can load six or seven at a time,” he added, explaining the length of time it would take to restore normality. He rejected the idea that Qatar’s decision to invoke force majeure and miss shipments would damage the country’s long-cherished reputation as the most reliable

supplier of LNG. “We don’t think anybody would dare to come to us and say we are not reliable because you were being bombed and you did not deliver,” he said. Even if it wanted to, Qatar was unable to find gas in the market to make good the lost deliveries to its clients, he said. “Let’s assume you want to buy 77 million and deliver it to customers, there is no 77 million tonnes lying around for you to buy.”

<https://www.ft.com/content/be122b17-e667-478d-be19-89d605e978e>
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BAROUDI SOUNDS ALARM ON HORMUZ, SAYS OIL COULD HIT \$150



A picture of the shipping traffic in the Strait of Hormuz.



March 2, 2026, DOHA, Qatar: In a televised interview with Al Jazeera's main Arabic channel, international energy expert Roudi Baroudi said that no country had the right to close the Strait of Hormuz.

The United Nations Convention on the Law of the Sea (UNCLOS), Baroudi told Al Jazeera, is clear on this matter, specifically Article 38, which explicitly guarantees the "right of transit passage, which shall not be impeded" for all foreign vessels transiting through the strait, and Article 44, which holds that states bordering straits "shall not hamper transit passage".

Baroudi also warned that if traffic through Hormuz were halted, oil prices would quickly soar past \$100 – and even \$150 if the interruption persisted for any length of time.

While the strait is commonly described as being 30-45 kilometers wide, he explained, most of it is too shallow for large vessels, and the transit lane – designated for the passage of all types of shipping, from oil tankers and LNG tankers to container ships and bulk food and other commercial cargos – is only 3 kilometers wide. Even here the depth is just 200-300 meters, and many of the oil tankers that use the strait are more than 325 meters long, and Qatar's Q-Max LNG carriers are 345 meters.

Baroudi also noted that while Iran and Oman have had a maritime border agreement in place since 1974, only Oman has fully ratified UNCLOS. Iran – like the UAE, whose coast also touches the strait – has signed but not fully implemented all of the provisions. Nonetheless, he said, UNCLOS' principles have become part of customary international law, making them enforceable on all coastal states, so all civilian vessels enjoy the right of passage without obstruction, inspection, or arbitrary restrictions.

Regarding the impact of current tensions, Baroudi noted that LNG prices were already rising and that \$100 or even \$150 oil was a distinct possibility if the conflict continued beyond a week or two. Any prolongation of exorbitant energy costs, he added, would have a direct and deleterious impact on the global economy, increasing inflationary pressures and the cost of living worldwide.

