Changing Global Maritime Order and the Strategic Significance of the North Arabian Sea: Prospects and Opportunities for Pakistan

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The global maritime order that existed before February 28, 2026, is under stress. The recent catalyst for change in this order is the war started by Israel and the United States against Iran and the ensuing closure of the Strait of Hormuz. Before the war started, the strait, a global energy and economic lifeline, was open to all. Now we see a massive disruption in navigation in and around the strait, which has become a contested battleground and a test of the viability of the existing international maritime law. It has also created opportunities for Pakistan to leverage its geographical contiguity to the North Arabian Sea to refine and upgrade its diplomatic, naval, and economic policies and practices.

The global maritime order is a complex web of international laws, treaties, and institutions governing the world's seas, oceans, and other water bodies to ensure free trade. Covering 70% of the planet's surface, water is considered a global common. The 1982 United Nations Convention on the Law of the Sea (UNCLOS) serves as the legal foundation of this order, defining territorial waters, continental shelves and Exclusive Economic Zones. Interestingly, the US is not a party to UNCLOS because its Senate has not ratified it. The world economy relies heavily on this order because 90% of global trade passes through sea lanes, 99% of international digital traffic and internet data is transmitted via underwater cables, and 66% of the world's wealth is generated along coastlines.

In addition to the Strait of Hormuz crisis, in the recent past, we have been hearing about brewing crises in the South China Sea, the Houthis' attacks on vessels in the Red Sea, shadow fleets, and sabotage of undersea pipelines and cables. In this context, the International Maritime Organisation, in collaboration with the United Nations and the International Chamber of Commerce, continues to use de-confliction mechanisms to resolve disputes.

The Arabian Sea, located in the northwest of the Indian Ocean, spans 3.9 square kilometres. Bordered by Iran and Pakistan to the north and the Horn of Africa and Arabian Peninsula to the south, it serves as a crucial military, energy and commercial artery. The Gulf of Oman connects the sea to the Persian Gulf via the Strait of Hormuz to the north. To the west, the Gulf of **Aden** links it to the Red Sea through the Bab el-Mandeb (Bāb al-Mandab) Strait.

During the US-Iran war, the Strait of Hormuz has become a weapon of war for Iran, more effective than a nuclear weapon, as the Secretary of the Iranian Supreme National Security Committee said recently, and a diplomatic bargaining chip. It has triggered the largest energy crisis since the 1970s, leading to spiralling energy costs and huge GDP losses. Worldwide, the crisis has already added a $330 billion premium to imports of crude oil, LNG and refined products, causing a sharp rise in energy prices. Developing countries, the European Union, and China have been hit particularly hard. Pakistan, according to the Pakistan Institute of Development Economics (PIDE), expects the baseline shock to the import bill to be at least $4.5 billion. Furthermore, the crisis has drained Pakistan's foreign exchange reserves and driven up its interest rates. Overall, the war risk premium has risen rapidly, and around 20,000 seafarers have been stranded at various times.

The crisis has also sparked significant legal questions. The relevant legal framework encompasses UNCLOS, customary international law, the International Convention for the Safety of Life at Sea, the

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International Regulations for Preventing Collisions at Sea and the principles enshrined in the United Nations Charter.

As a littoral state, Iran has claimed sovereignty over the Strait of Hormuz and asserted its right to govern it. It has shown some flexibility by negotiating with Oman, the other littoral state, to develop a joint mechanism for controlling the strait. The United States, however, strongly opposes any such arrangement. It advocates for unrestricted passage and supports the use of the southern corridor, close to the Omani border, backed by the International Maritime Organisation (IMO), the UK, and France.

Although Iran has signed the United Nations Convention on the Law of the Sea (UNCLOS), it has not ratified it. Consequently, it bases its position on Article 51 of the UN Charter, which allows for self-defence, and the "innocent passage" principle of the 1958 Geneva Convention on the Territorial Sea and the Contiguous Zone, as well as the 1949 Corfu Channel case. Tehran alleges that US vessels pass through the Strait to attack Iran or replenish arms and ammunition in the American bases in the Gulf States that target its territory. It has consistently objected to the legality of these transit passages under customary international law.

Iran is leveraging the reopening of the strait as a bargaining chip to secure the lifting of the US naval blockade and ceasefires in Gaza, Lebanon and Syria. Admiral Brad Cooper, Commander of CENTCOM, asserts that the strait is open for navigation and that under US supervision, over 1,500 tankers carrying 750 million barrels of oil have passed through it over the past few months. However, Kpler, a global firm specialising in maritime logistics and energy trade flows, reports a significant drop. By late August 2026, according to Kpler, daily transits had fallen to 1 to 2 vessels a day, a stark contrast to the average of 100 to 130 vessels per day before February 28.

In response to escalating regional threats, Saudi Arabia convened a meeting in Riyadh on July 31, bringing together 43 countries to form a Multinational Maritime Defence Coalition. Pakistan has joined this coalition, along with Saudi Arabia, Kuwait, Bahrain, Qatar, Türkiye, Egypt, Jordan, Yemen, Bangladesh, Nigeria, Sudan, Djibouti and Somalia. The initiative aims to counter maritime security threats and protect critical energy routes and global trade lines from naval blockades and obstruction of commercial shipping. The coalition will patrol the Red Sea, the Bab al-Mandeb Strait, and the Gulf of Aden by improving maritime coordination, sharing intelligence, conducting joint military exercises, and building operational capabilities**.** In addition, as members of the Mecca Joint Defence Agreement, Saudi Arabia, Pakistan and Turkiye are bound to oppose major threats to maritime security in the Northern Arabian Sea.

The Iran–United States war has demonstrated several lessons. A crisis in the Strait of Hormuz does not remain confined to the Gulf. It reaches across the globe and hits the balance sheets of vulnerable countries such as Pakistan. It has also shown that a formidable naval power cannot guarantee maritime order alone. While warships can escort vessels, patrol sea lanes, and clear mines, they cannot be a substitute for diplomacy, legal precision, and political compromises. Furthermore, less expensive projectiles can destroy expensive military platforms.

Legally, a balance is needed between coastal state security and the international community's navigational rights. Iran and Oman have legitimate sovereignty and security rights and interests in their territorial waters, while commercial vessels have a recognised right to use international straits. During wartime, temporary and proportionate safety measures may be justified, but they don't grant an unlimited right to block international passage. Practices in the Strait of Hormuz, however, may set precedents for other chokepoints such as the Straits of Malacca, Singapore, Bab-al-Mandab, Gibraltar, and Turkey.

Pakistan's position should remain principled and balanced: freedom and safety of navigation in accordance with international law; respect for the sovereignty of coastal states; non-weaponisation of commercial shipping; protection of civilian seafarers; and peaceful settlement of maritime disputes.

Pakistan played a pivotal diplomatic role between the US and Iran in averting an even more catastrophic war. Through its mediation, it brokered a ceasefire and high-level direct talks between the US and Iran. It facilitated the preparation and signing of a foundational document – the Memorandum of Understanding. Right now, however, everything is up in the air because of a standoff shadowed by the Iranian insistence on maintaining control over the Strait of Hormuz and the United States' military threats and economic warfare against Iran.

Little is known about Pakistan's part in arranging safe passage for many cargo vessels and oil tankers during the war. Pakistan-led regional mediation helped establish temporary confidence-building measures for select commercial and energy shipments. It used active diplomacy to secure safe passage for 20 flagged vessels, two per day, through the Strait of Hormuz. To circumvent the maritime blockade, Pakistan activated six overland transit corridors to route 3,000 stranded cargo ships from Karachi Port, Port Qasim and Gwadar Port directly into Iran.

This led to something unusual. Far East vessels bypassed the Strait of Hormuz, altered their routes, and sailed to the Pakistani ports. The marine insurers removed Pakistan from the high-risk premium list. Moreover, Pakistan established a new corridor between its ports and Iran, signalling new opportunities for connectivity in the postwar period to Central Asia, Russia, Turkey and Europe.

Pakistan was able to play such an effective role because, over the years, it had developed a strong maritime security reputation in the region. The Pakistan Navy is a longstanding participant in the Combined Maritime Forces, established in 2001 and headquartered in Bahrain, where the US 5th Fleet is based. A 47-nation naval force, the CMF operates across 3.2 million square miles of waters.

Pakistan has commanded, 25 times, Combined Task Force 150 and Combined Task Force 151. The former conducts maritime-security operations outside the Persian Gulf, while the latter counters piracy. Pakistani leadership of these missions has helped coordinate patrols and share information with the European Union Naval Force and other regional partners. From January to July 2026, Pakistan again commanded CTF-150, supporting maritime-security operations and a major counternarcotics interdiction. These commands demonstrate leadership of multinational forces, interoperability, and partnership with other navies.

Pakistan Navy's two-yearly AMAN exercises have become a significant instrument of naval diplomacy. They bring together ships, aircraft, special-operations forces, officials and analysts from across the globe to host both operational exercises and professional communication through the AMAN Dialogue of navies with divergent alignments. AMAN Dialogue has already become an important forum for the Indian Ocean and the North Arabian Sea.

Over the years, Pakistan has developed mine-detection and mine-clearance capabilities. However, the current Gulf crisis, which could recur in the Gulfs of Oman, Aden and the Red Sea, necessitates an upgrade in these capabilities. This involves investing in mine-clearance vessels, hydrographic surveys, uncrewed underwater vehicles and seabed surveillance. These advancements would allow Pakistan to participate effectively in regional safe-passage and maritime recovery missions.

Pakistan's military maritime credentials surpass its civilian maritime profile. To become a maritime power in the North Arabian Sea and beyond, Pakistan must address this imbalance. The Pakistan Navy is manufacturing and inducting state-of-the-art corvettes, frigates and submarines and is also investing heavily in quality education and training. The civilian maritime sector, particularly the private enterprises, needs to catch up.

Pakistan boasts a coastline of approximately 1,050 kilometres and an exclusive economic zone of roughly 290,000 square kilometres, encompassing its territorial waters, continental shelf, and Exclusive Economic Zone (EEZ). These waters should be considered Pakistan's fifth province, second only to Balochistan in size. Karachi Port and Port Qasim handle the vast majority of Pakistan's external cargo. Gwadar, situated about 400 kilometres from the Strait of Hormuz, holds the potential to become a regional logistics, transhipment, energy and industrial hub.

During the war, Gwadar demonstrated its newly acquired transhipment capacity, with one cargo vessel delivering over 14,000 tonnes for onward transport. This demonstrated Gwadar's capacity to extend beyond domestic trade, offering an alternative commercial route for neighbouring and landlocked economies. Gwadar would complement rather than displace Karachi Port and Port Qasim. To maximise the use of these ports, they must be fully integrated through roads, railways, pipelines, warehouses, cold chains, digital customs, financial services and industrial zones. Pakistan's merchant fleet needs expansion. Pakistan incurs substantial foreign freight costs because foreign-flagged vessels carry most of its trade. While the Pakistan National Shipping Corporation boasts decades of experience and operates tankers, bulk carriers, and other shipping services, its fleet remains small compared to Pakistan's commerce volume. Recent acquisitions of crude-oil and product tankers are steps in the right direction, but a much larger procurement is needed.

Our future work must align with the blue economy. Pakistan's maritime sector contributes only 0.4 to 0.5 per cent to GDP, or approximately one billion dollars. Seafood exports currently generate nearly $500 million. The government's stated goal of a 100-billion-dollar blue economy by 2047 is an aspiration for now. To achieve this, we must reorient and reorganise our investment and technological infrastructure. Regrettably, this is not happening at the required pace, but the potential is immense for offshore energy, seabed resources, marine biotechnology, undersea cables, onshore renewables, mangrove conservation and coastal tourism.

Over the years, I have seen the National Institute of Maritime Affairs (NIMA) do an excellent job in linking our naval capabilities to the economy through law, technology, climate science, and diplomacy. More importantly, it is acting as a catalyst for fostering connections between the public and private sectors. Now it also offers consultancy services to the corporate world.

Its research on naval competition, maritime trade, port performance, the blue economy, international law, and coastal development is backed by reliable databases. These insights guide Pakistan's decisions on vessel movements, freight rates, fisheries, marine pollution, and regional port capacities. Furthermore, it conducts crisis simulations and war gaming with naval officers, diplomats, economists, shipping companies, energy planners and humanitarian agencies.

If not already established, NIMA may consider creating a North Arabian Sea Observatory with help from the Pakistan Navy and the Ministry of Maritime Affairs. This observatory would monitor shipping, energy flows, maritime security incidents, climate risks, naval deployments, and regional policies. Such an observatory would generate early-warning reports and assessments.

NIMA should also promote maritime literacy among decision-makers - parliamentarians, civil servants, journalists, students and the wider population. A maritime nation needs a broad but compelling national consciousness of the maritime sector's importance for its economy.

Diplomatically, Pakistan should propose to like-minded countries the establishment of a mechanism for crisis communication, navigational safety, search and rescue, pollution control and the protection of civilian shipping in the North Arabian Sea. Such a mechanism need not commence as a formal alliance, but could evolve gradually through technical cooperation.

Pakistan's role is to ensure the security of the North Arabian Sea and utilise it to support growth in its maritime sector as part of a broader ecosystem. Anchored in strategic, balanced partnerships, Pakistan's maritime policies seek to deepen relations with China, promote closer ties with the United States and collaborate with all Gulf states and Turkey. This multi-vector approach may be termed cooperative multipolarity.

Pakistan must protect its sea lanes without militarising its entire maritime outlook. We must develop Gwadar without neglecting Karachi and Port Qasim; expand hard-core naval capability while strengthening merchant shipping and the blue economy; and work with major powers without compromising on strategic autonomy. And we must ensure that maritime development improves the lives of our population, especially the people living along our coast.

Let me conclude with four propositions.

First, Pakistan's economic security will flourish at sea.
Second, the North Arabian Sea is not our border; it is a gateway to the world.
Third, ports gain strategic value only when connected to productive industries, efficient transport systems, and prosperous local communities.
Fourth, Pakistan should seek not to be merely a fixture in the changing maritime order but an influencer in shaping it.

Right now, Pakistan has earned good credentials in the North Arabian Sea region as a mediator and a stability provider. From this high threshold, it should become a commercial correlative, a technology hub, and an architect of a more cooperative maritime order. The oceans will define much of this century's geopolitics and prosperity. Pakistan's future will depend, to a considerable degree, on how intelligently and confidently it embraces the sea.
