



Eye in the sky adds new dimension to Iran conflict

2 MONTHS AGO

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Boosting surveillance over the Strait of Hormuz risks escalating confrontation among great powers China, US, and India.



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The intensification of aerial and satellite surveillance over the Strait of Hormuz marks a decisive shift in how great power rivalry can unfold.

Rather than take on each other through direct naval confrontation alone, the big powers can also engage in persistent observation, tracking, and strategic signalling.

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What appears, at first glance, as a technical adaptation by the US Navy is, in fact, a profound geopolitical recalibration shaped by vulnerability, deterrence, and economic interdependence.

At the heart of this transformation lies a simple but dangerous reality: the Strait of Hormuz is no longer merely a maritime chokepoint.

It has become a contested surveillance theatre where intelligence gathering risks are interpreted as provocation.

The US, acutely aware of the dense network of anti-ship missiles, drones, and swarm tactics employed by Iran's Islamic Revolutionary Guard Corps (IRGC), has found its traditional naval dominance constrained.

The proximity required for surface fleet operations in such a narrow waterway – at points barely 21 miles (33.7km) across – renders even the most advanced naval assets susceptible to asymmetric attacks.

As a result, Washington has pivoted towards aerial reconnaissance and satellite monitoring as safer alternatives to track Iranian tanker movements.

Yet this shift is not without consequence.

China, which imports approximately 13% of its crude oil from Iran for total energy consumption, is not merely a passive observer in this unfolding drama.

IRGC, for its part, sells up to 90% of its oil exports to Beijing.

This deep energy interdependence transforms what might otherwise be a bilateral US-Iran confrontation into a triangular strategic dilemma involving China. How?

Every satellite image captured, every drone flight conducted, and every tanker tracked by the US Navy, say, in the Indian Ocean, carries with it the implicit possibility of interception.

That's the US's interception of Iranian vessels heading for China. Will China just sit and not escort the Iranian vessels to China too? This is now a major question confronting China, the US and Iran.

Thus, should the US move from surveillance to interdiction – whether through sanctions enforcement or physical disruption – it would not only target IRGC's revenue streams but also directly affect China's energy security.

This is where the geopolitical calculus becomes perilous.

China cannot afford to remain neutral if its energy lifelines are threatened.

The logic of great power politics dictates that Beijing may be compelled to respond – diplomatically at first, but potentially in more assertive ways – should Washington attempt to interdict vessels bound for Chinese ports.

China, after all, has a solitary naval base in Djibouti too. Not that far from Red Sea, the Strait of Hormuz, the Persian Gulf and the Indian Ocean.

The result is a triage of tension in which Iran seeks to sustain its economic survival, the US attempts to enforce strategic pressure, and China strives to secure uninterrupted energy supplies. But that is not all.

The situation becomes even more complex with the inclu

New Delhi, another significant importer of Iranian crude, introduces a fourth dimension to this evolving crisis.

While India has historically balanced its relations between Washington and Tehran, any disruption to its energy flows could force it into difficult strategic choices.

What begins as a triangular contest thus evolves into a quadrangular predicament involving Iran, the US, China, and India – each with distinct but overlapping interests.

Therefore, compounding this dynamic in the Strait of Hormuz is the phenomenon of what might be termed a “double blockade” leading to multiple strategic implications.

On one hand, Iran has restricted passage to vessels it deems hostile, selectively allowing tankers from friendly nations such as China and India, even Pakistan and Malaysia to transit.

On the other hand, the US has sought to limit Iran's ability to export oil, whether through sanctions, monitoring, or potential interdiction in high seas which Iran calls “piracy”, while JD Vance has warned Iran of “economic terrorism” in the Strait of Hormuz that affects the whole world.

Caught between these two pressures, with cascading implications, are the global energy markets, already strained by disruptions to supply chains involving fuel, fertilisers, animal feed and industrial inputs such as helium and sulphur.

The consequences are systemic, affecting not only oil prices but also food security, agricultural production, and semiconductor manufacturing worldwide. The motherboard of the semiconductor is after all made of plastic derivative.

In this context, the reliance on aerial and satellite imagery by the US is not merely a tactical adjustment – it is compounding the rivalry of great powers and their supply chain. All of which when not handled well leads to demand destruction.

For now the US is signalling its intent to monitor the Iranian vessels without immediately escalating to direct confrontation so far. But as one Japanese proverb affirms “an inch ahead is darkness in politics”. No one knows what will happen, which is why the prices of fuel and LNG remain high.

In summary, the very act of surveillance by the US Navy, especially when directed at vessels bound for major powers such as China and India, risks being interpreted as a precursor to more aggressive actions with all the attendant great power retaliation at the high seas or elsewhere.

This is why diplomacy remains indispensable.

The remarks by Turkish foreign minister Hakan Fidan on April 13 are therefore not to be dismissed lightly.

His assertion that both Iran and the US remain committed to dialogue, rather than confrontation, offers a critical window of opportunity.

Turkey's unique position – maintaining channels with both Washington and Tehran – allows it to serve as a potential intermediary at a time when mistrust runs deep.

The alternative to negotiation is not stability, but escalation through miscalculation.

In an environment where drones replace destroyers and satellites substitute for surveillance ships, the margin for error remains perilously thin.

A misinterpreted signal, an intercepted transmission, or an unexpected manoeuvre could rapidly spiral into a broader conflict involving multiple great powers.

Thus, the Strait of Hormuz today is not only a test of military capability but also of diplomatic maturity.

The US, Iran, China, and India must recognise that their interactions are no longer isolated.

Each action reverberates across a tightly interconnected system where energy security, economic stability, and geopolitical rivalry converge.

Surveillance may provide clarity, over who's who and what's what that are being transported out of the Strait of Hormuz, but it cannot substitute for trust.

Only sustained diplomacy – quiet, persistent, and inclusive – can prevent this fragile equilibrium from collapsing into sheer great power melee and confrontation.

The views expressed are those of the writer and do not necessarily reflect those of FMT.

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