

THE IN A HURRY SERIES

Geopolitics *in a Hurry*

Reading the world's fault lines

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The Whole Thing in One Page

The Strait of Hormuz is narrow. That fact explains why interruption can be costly. It does not explain who chooses to threaten passage, which ships will keep moving or how other governments will respond. The familiar image of geopolitics, in which countries obey instructions hidden in their geography, mistakes a constraint for a decision.

Geography shapes the price of action. Distance consumes time and supplies. Mountains channel movement. Harbours and canals concentrate it. Territory also contains people, institutions and attachments that cannot be read from a relief map. A place described by an outsider as strategic depth may be somebody else's homeland. Its military usefulness establishes no right to control it.

Assets become power through organisation. Population needs skills and employment; resources need extraction and transport; armed forces need crews, maintenance, intelligence and access. The result depends on the task. A state capable of defeating an army may be unable to build an accepted political order afterwards. In 1956, Britain and France could attack Egypt but could not sustain their policy against American pressure and wider opposition. Their forces and their dependencies belonged in the same calculation.

Objectives are political too. States contain institutions and competing interests rather than one mind. Leaders must secure authority and cooperation, even where dissent is suppressed. Turkey's parliament could refuse a troop deployment that its American ally wanted. Nationalism can make a concession unacceptable; a ruling coalition can place survival above national income. Explanations improve when the decision-maker and the constraint are identified instead of concealed inside a country's outline.

Security then depends on another side's response. Defensive preparations can look offensive and provoke countermeasures. Deterrence tries to prevent an action; compellence tries to induce a change. Both require credibility and communication. Nuclear retaliation can restrain attack without

making escalation impossible. The security dilemma explains reciprocal fear, but it does not turn every invasion into a misunderstanding or allocate responsibility equally.

Alliances, institutions and law alter the balance. Commitments can multiply capability and make a local attack carry wider costs. Their implementation still requires political decisions. Smaller states can bargain, hedge and contest claims rather than function as passive pieces. International law can shape recognition and cooperation without guaranteeing enforcement. Legal authority and physical control remain different facts.

Economic connection adds another distribution of power. A supplier, payment system or manufacturing stage can become leverage where alternatives are costly. Initial disruption is different from vulnerability after feasible adjustment. The semiconductor chain makes the distinction visible: production is internationally distributed, yet particular stages remain concentrated. A replacement requires functioning skills and infrastructure, not a new name on a supplier list.

The same mechanism connects Europe's security disputes, Taiwan, Gulf shipping and bargaining over the Nile without making those cases identical. Local history and agency determine what the shared concepts explain. Efforts to gain security then change the setting: threatened customers seek substitutes, neighbours seek allies, technologies alter routes and climate pressures test infrastructure. An advantage can create the response that weakens it.

A fault line is therefore a relationship under pressure, not a place condemned to conflict. Read it through the objective, the means available, the choices of others and the costs imposed on people who may have no voice in the decision.

That is the book.

Why You Should Care

On 28 August 2026, the International Maritime Organization reported that around six thousand seafarers on up to four hundred ships remained unable to leave the Persian Gulf safely. Six months of conflict had made passage through the Strait of Hormuz dangerous. The organisation had verified nineteen seafarer deaths. A narrow strip of water had become the place where military decisions far above a crew's authority determined whether its members could go home.

That predicament connects scales that ordinary political language keeps apart. A shipping insurer's conditions, a refinery's crude supply, a government's naval deployment and the price paid by a distant farmer can become parts of the same disruption. Geopolitics traces those connections. It explains how the passage concentrates dependence without pretending that its narrowness caused the conflict or determined anyone's right to interfere with it.

The distinction matters because strategic claims often arrive disguised as natural facts. Leaders say a country needs depth, deserves a sphere of influence or cannot tolerate a neighbour's alliance. Commentators point to mountains, ports and encirclement. Some constraints are real. The word need then performs work it has not earned. A government may prefer control over its neighbours. Geography does not turn that preference into a right, remove the neighbours' agency or prove that coercion was unavoidable.

The subject also changes how power looks. An aircraft carrier is conspicuous. The host-country agreement allowing aircraft to operate may be less visible and just as consequential. Oil reserves attract attention; the ability to refine, transport and sell the output determines what can be done with them. A large population is not a forecast of national success. Education, employment and institutions decide how much of its potential becomes usable capability. Geopolitics is interesting because impressive possessions so often fail to produce the result expected of them.

Conversely, seemingly modest actors can matter greatly. A parliament can refuse access that powerful allies assumed would be available. A coastal state can contest a major power's maritime claim through international law. A country between rival patrons can negotiate among relationships rather than belong wholly to one. These are not exceptions to the real story of great powers. They are part of what great powers encounter when they try to act.

The effects reach ordinary life before most people recognise the route. A manufacturer depends on a specialised supplier abroad. A household's electricity bill reflects conditions in an international fuel market. A communications link depends on an undersea cable and the capacity to repair it. Commercial arrangements that look efficient in normal conditions can conceal dependence on political decisions elsewhere. Conversely, paying to reduce that dependence has costs that must be borne before any crisis vindicates the expense.

There is also a more demanding reason to learn the subject. A strategic description can make other people's lives look like obstacles, resources or collateral costs. Taiwan becomes a chip factory; Ukraine becomes a buffer; a river becomes a weapon. Those descriptions may identify a real relationship while removing the political communities inside it. A useful account restores them without abandoning analysis of power.

This book cannot provide a timetable for the next war. It can give you a working model of the pressures behind the headlines, from European security to the Indo-Pacific, the Gulf and shared African waterways. It follows the conversion of position into capability, the formation of political objectives, and the responses that alter the original advantage. Once those relationships become visible, a crisis is more than a distant flash. You can begin to see what sustains it, which changes might reduce it and what a confident prediction has left out.

The Core Ideas

Space Charges a Price

A map trains the eye to treat distance as empty colour. Strategy begins when the colour becomes a bill.

An army moving five hundred kilometres needs fuel, bridges, maintenance, food, communications, medical support and a route that still works after the enemy has noticed it. A ship crossing an ocean needs replenishment, repair and access to ports. A state separated from a market by mountains faces higher transport costs and fewer alternative connections. Islands gain a moat and inherit dependence on whatever crosses it. Strategic depth buys time only if forces can use the space, infrastructure can support them and the government can trade territory without political collapse.

This is geography as friction. Terrain changes speed, visibility and concentration. Climate changes what equipment and people can sustain. Rivers can carry commerce in peace and become obstacles or avenues in war. Plains can ease movement for defenders and attackers alike. A mountain chain may protect a frontier while dividing the state behind it. No feature comes with one permanent meaning.

Scale changes the bill. A patrol may cross a ridge that an armoured formation cannot. A road adequate for peacetime trade can fail under the weight and timing of military traffic. A country can be close by air and remote by usable transport. Maps measured in kilometres miss gradients, bridge limits, weather windows and the fact that movement in one direction may be far easier than movement back. Strategic distance is the effort required, not the ruler laid across the paper.

Space is inhabited as well as crossed. Cities, language communities, sacred places and transport networks give territory political weight that a relief map cannot show. A corridor that looks expendable to an outside planner may contain a government's tax base or a population unwilling to be traded for time. Human geography can make a tactically useful retreat politically

impossible. Describing a place as a buffer conceals the people who would have to live inside somebody else's defence plan.

Russia illustrates the danger of turning friction into fate. Its western approaches include extensive open ground, and Russian rulers have repeatedly sought distance, forward control and compliant neighbours. Those conditions help explain strategic anxieties. They do not prove that every government in Moscow must dominate neighbouring states, or that invasion is an involuntary geographical reflex. The same plain carries railways, commerce, people and ideas. What matters depends on capability, technology and political choice, including the choices of the countries being described as approaches to somewhere else.

Position therefore needs a second question: position relative to what? Gibraltar overlooks passage between the Atlantic and Mediterranean. A remote island can become valuable when aircraft need a runway and lose some of that advantage when ranges increase. A port's value depends on the inland network it serves, not merely the water beside it. Location can remain unchanged while the connections that make it useful move elsewhere.

Ukraine and Taiwan are not dangerous places because their physical geography contains an instruction to fight. Their locations affect the methods and costs of coercion. The conflicts arise from political claims and choices pressed into those locations. To read a fault line, begin with the ground and water, but do not let the physical map answer a question about rights or intentions. Geography can show why a policy is expensive. It cannot show that the policy is necessary.

Assets Become Power Through Organisation

An aircraft on an inventory is not the same thing as an aircraft that can fly today, reach its target, return, be repaired and fly again. The difference is easy to lose in a league table of national strength.

A country can possess resources without possessing the institutions that make them useful. Oil underground needs extraction, transport and buyers.

A natural harbour needs docks, cranes, reliable administration and links inland. A large population offers workers and a market, but numbers alone reveal little about health, education, employment or the state's ability to raise revenue. National assets are ingredients. The organised capacity to use them is a separate achievement.

Military power makes the conversion especially visible. Equipment requires trained crews and maintenance. Operations require fuel, ammunition, intelligence and communication. A stockpile can be impressive while its contents are obsolete, incompatible or in the wrong place. Spending measures an input, not the political result purchased with it. Exchange rates, domestic costs and different accounting practices make international budget comparisons less decisive than their tidy rankings suggest.

This year's budget must keep old equipment working as well as buy new equipment. A fleet, meanwhile, contains the results of decisions made over decades. Set one country's annual spending beside another's total number of ships and the comparison has gone wrong before either navy leaves harbour: one figure measures a flow of money, the other an accumulated stock. Even two fleets of equal size may differ sharply in what they can put to sea.

A smaller force operating near its own supply network may impose prohibitive costs on a larger expeditionary force. The latter must bring more of its support with it and persuade other governments to provide access. Long-range aircraft still need airfields and tankers. Naval forces need replenishment and repair. An overseas base is often a negotiated relationship on another country's territory. Its usefulness depends on permission as well as concrete.

This dependence is one reason maritime power involves more than warships. More than four-fifths of international goods trade, measured by volume, travels by sea. Yet traffic gathers into particular ports, channels and approaches. Protecting it involves commercial operators, insurers, coastguards, repair facilities and the governments controlling access. The Strait of Malacca or the Suez Canal matters because of what can move

through it and the cost of using another route. Water alone does not organise commerce.

Logistics also changes the meaning of a front line. An attacker can occupy ground faster than supplies can follow. A defender can lose territory while preserving a functioning force. The decisive shortage may concern replacement engines or qualified technicians rather than the weapons receiving the publicity. Coalitions add the problem of interoperability: different national forces must exchange information, replenish equipment and operate together. Those arrangements take practice. Adding up allies' inventories does not establish that their contents form one usable arsenal.

The civilian machinery matters just as much. Tax collection sustains expenditure. Procurement turns budgets into equipment, sometimes badly. Reliable electricity and transport allow factories to keep producing. Public confidence affects whether people accept taxes, disruption or service. Coercion can extract labour and obedience, but it can also conceal failure from those giving orders. Capacity means that decisions become functioning activity; it does not mean that the decisions are wise or legitimate.

Even functioning activity is not the same as success. Destroying an opposing army, governing its territory and securing a durable political settlement are different tasks. A state may excel at the first and fail at the others. The useful comparison therefore starts with the objective: which actor can achieve which result, where, for how long and at what cost? Without that question, a power ranking resembles a list of tools without the job they must perform.

States Do Not Have One Mind

On 1 March 2003, Turkey's parliament failed to authorise the deployment of United States troops on Turkish territory for a northern front against Iraq. The motion won 264 votes but needed 267, a majority of the members present. The governments had been negotiating an arrangement. Turkey was a NATO ally. Geography made its territory useful. A plan for moving an army had met a rule for counting votes.

The episode exposes an omission in the usual geopolitical map. Countries have outlines, so they look like single decision-makers. They contain competing institutions and people. A government must form an objective, obtain authority and recruit enough cooperation to act. Diplomats, military commanders, exporters, opposition parties and households may attach different values to the same relationship. The national interest is partly an argument about which interests count.

Some aims have broad support: preventing invasion, maintaining food supplies or avoiding economic collapse. Even then, the proposed means distribute costs unevenly. A tariff can protect one factory and raise another's input prices. A base can supply jobs while exposing its surroundings to military risk. Sanctions can hurt a target while also hurting the businesses expected to enforce them. Policies emerge from institutions that decide whose losses are tolerable and whose objections can stop the process.

Democracy and dictatorship organise this argument differently, but neither removes it. Elections, parliaments and courts can block or revise policy. An authoritarian leader may face fewer public obstacles while remaining dependent on military officers, party networks, security services or business patrons. Concentrated authority can make a decision fast and make unwelcome information harder to deliver. Open disagreement can delay action and reveal defects before they become disasters. Neither institutional form guarantees strategic competence.

The costs of a policy can reach the population without reaching the people deciding it. Exporters might lose customers while a protected industry gains

contracts; households might pay more for fuel while an indispensable political supporter remains insulated. A leader can therefore accept national economic damage without regarding the decision as personally ruinous. That mechanism does not establish any particular leader's motive. It tells us what evidence to seek: whose support the government needs, what that support depends on and where the losses fall.

Some losses cannot be priced in money. Territory can contain a sacred place, family graves or a population understood as part of the nation. A settlement that improves trade may still demand a concession its opponents call betrayal. Leaders can strengthen those attachments by repeating a territorial claim in schools, ceremonies and official speeches. They cannot assume that the claim will become negotiable whenever bargaining makes compromise convenient. The public commitment made to strengthen a government can later restrict the bargain it is able to accept.

Ideas therefore affect material power. A population that regards defence as legitimate may endure losses outsiders expected to break it. A government that calls a neighbouring people incapable of independent action may misread resistance. Conversely, military institutions can prepare thoroughly for an enemy defined by habit while overlooking another form of pressure. Beliefs influence what gets built, what counts as warning and which facts reach a decision-maker.

Domestic constraints can also become a bargaining resource. A negotiator unable to obtain approval for certain terms may persuade the other side to revise them, provided the limit is credible. The same constraint can destroy an agreement both governments prefer. The foreign counterpart is negotiating with a process as well as a person, and must distinguish an undertaking that can become binding from an expression of intent.

Turkey's vote mattered because a route through allied territory remained a domestic political decision. The same distinction matters beyond war. A foreign investor's agreement with a president may still require a regulator, legislature or local community to act.

Security Depends on Another Side's Response

States buy weapons in the name of defence. Their neighbours can believe the stated purpose and still become more frightened.

Imagine two neighbouring governments that both want to avoid war. One builds a road so that reinforcements can reach an exposed frontier. The other sees a road down which an invading army could travel, and moves more troops towards it. The first government now faces a stronger force opposite its new road. What began as a way to feel safer has supplied a reason to feel less safe. Neither government needed to lie about its original purpose.

This is the security dilemma: an attempt to increase one state's safety changes what others must prepare for. Intentions cannot be inspected like a bridge. The problem is strongest when offensive and defensive capabilities are difficult to distinguish and attacking first appears advantageous. It weakens when territory is hard to seize, warning time is adequate and restraints can be verified. There is no permanent division between reassuring and threatening equipment. The road's military meaning depends on what can travel down it and what lies at the other end.

Not every rivalry is a tragic misunderstanding. A government may seek conquest or domination and use defensive language as justification. The security dilemma is most illuminating when actors would prefer safety to expansion yet cannot make their preparations reassuring. It must not turn evidence of aggression into an equal allocation of blame. Understanding a government's fear is different from accepting its claimed right to remove another country's independence.

Deterrence is one way to influence the calculation. It tries to prevent an action by making its expected costs or difficulties unacceptable. Denial aims to convince an opponent that an attack will fail. Punishment threatens a cost even if the initial attack succeeds. Both depend on the opponent noticing the warning and believing enough of it. A costly threat can fail because it is incredible; a modest capability can deter where the disputed prize is worth

little.

Compellence asks for a change rather than restraint: withdraw forces, abandon a programme or reopen a route. It is often harder because the target must visibly reverse itself, and compliance needs an agreed stopping point. A threat that offers no assurance of relief can leave resistance looking preferable. Diplomacy matters here as a way of specifying the bargain. The other side must understand what action would end the pressure, not merely that more pain is possible.

Nuclear weapons intensify these problems. Retaliation can make an attack on a nuclear state catastrophically unattractive, but the protection is neither unlimited nor automatic. Leaders may test what they believe lies below the opponent's threshold. Conventional strikes can threaten systems another government considers vital to nuclear survival. A posture intended to deter can create pressure to act quickly when warning is uncertain. The absence of nuclear use does not demonstrate that every decision along the way was safe.

Restraint can be engineered as well as demanded. Notifications reduce surprise. Verification makes limits more credible. Hotlines can clarify an incident before public commitments harden. Agreements can separate forces or define conduct in contested areas without settling every underlying dispute. Such measures do not require affection, and they do not guarantee good faith. They alter the information and choices available at the moment when each side must decide whether the other is preparing to attack.

Cooperation Changes the Balance

A small multinational force can pose a larger problem to an attacker than its headcount suggests. Attacking it would immediately involve several states. The question is no longer just whether its positions can be overrun, but what the governments behind those troops would do next. An alliance attaches distant power to a local risk.

That connection must be made credible. Common plans and repeated exercises show how assistance could arrive; routes and supply

arrangements help make it possible. The promise still requires a political decision when the danger comes. Cooperation lets a country obtain protection, access or information it could not provide alone, but none arrives free of obligations. Partners negotiate over what they owe, what they can deliver and which risks they are prepared to share.

NATO's Article 5 illustrates the difference between obligation and automatic behaviour. After a qualifying armed attack, each ally is obliged to assist through the action it deems necessary, which may include armed force. The treaty does not require every member to make an identical military response. Its geographical provisions matter, as does the attacked ally's consent or request for assistance. Article 5 was invoked following the attacks of 11 September 2001. Credibility rests on the machinery and political expectations built around the text, not on a sentence acting alone.

Smaller states enter these relationships with purposes of their own. They may seek protection from a threatening neighbour while fearing abandonment by the protector. The protector may fear being drawn into a quarrel it did not choose. Consultation, conditions on assistance and common planning manage these competing anxieties. A patron with overwhelming material resources does not thereby acquire complete control of its partner's decisions. Dependence gives influence, but both sides can possess something the other needs.

Cooperation also works without a defence guarantee. States can share maritime information, coordinate standards or finance infrastructure while refusing commitments on other questions. Hedging means preserving options rather than choosing one patron for every relationship. A government can welcome investment from one major power and security cooperation with another. The arrangement may become harder under pressure, but describing it as indecision misses the interest it serves: avoiding exclusive dependence.

A bargain becomes more useful when it survives the departure of the ministers who shook hands over it. A trading firm needs to know what treatment its goods will receive next month, not just what was promised at a

summit. Written rules, monitoring and continuing contact between officials give disagreements somewhere to go before they become crises. The European Union goes further in specified fields: members have conferred powers on common institutions rather than requiring fresh agreement for every decision. Giving up some freedom to change course is part of what makes their promises worth accepting.

Law is part of this structure, not an alternative universe outside power. The United Nations Charter prohibits the threat or use of force contrary to its principles, while providing for self-defence and collective security. It does not guarantee enforcement against a powerful violator. Security Council vetoes can block action. Nevertheless, legal status affects recognition, diplomatic support and the conditions under which other states cooperate.

A reputation for keeping agreements can save effort: partners need fewer safeguards when they expect a commitment to survive a change of minister. Attraction to a country's institutions or culture may also make cooperation easier. But goodwill does not settle the bargain. When costs rise, partners need a reason to stay that is stronger than their admiration for one another.

Connection Creates Unequal Dependence

Consider two imaginary countries cut off from the same gas supplier. Both suffer an immediate shock. One has terminals that can receive shipments from elsewhere, storage to bridge an interruption and money to bid for replacements. The other lacks these at the necessary scale. It may eventually build them, but being told that gas exists somewhere else does not heat a house.

The distinction is between sensitivity and vulnerability. Sensitivity measures the cost of disruption within existing policies and arrangements. Vulnerability asks what costs remain once feasible alternatives and policy changes are considered. Adjustment takes time, but time alone does not produce a terminal or pay for its cargo. Two countries can gain from the same relationship while having sharply different means of surviving its loss.

The distinction changes how a threat should be read. A supplier with a large

market share may be replaceable at modest cost. A small supplier of one specialised input may be difficult to replace at any acceptable speed. Dependence is partly a question of complementarity: a factory can have nearly everything it needs and still stop because one indispensable item is missing. Counting suppliers also misleads if they all rely on the same upstream producer.

Modern networks give this asymmetry a particular shape. Payments, insurance, data services and production chains often pass through central firms or jurisdictions. A state able to regulate a crucial node can sometimes obtain information or exclude others from it. Centrality alone is insufficient. Authorities need legal powers, administrative capacity and cooperation from the firms concerned. A network operating through a country's territory is not necessarily available for whatever coercive purpose its government imagines.

This is why a sanctions announcement needs to be read past the size of the threatened loss. What is the loss supposed to make someone do? Restricting a component may slow production without forcing a government to abandon its policy. Freezing assets may deny resources without changing a leader's priorities. Those can be useful effects, but they are different achievements. A measure meant to obstruct an arms programme should not be judged as though it promised to overthrow a government. Nor does economic damage prove that a demand for withdrawal has worked. Enforcement gaps, alternative partners and the target's willingness to bear losses shape the result.

The semiconductor chain makes the practical problem visible. Design tools, specialised equipment, materials, fabrication, packaging and testing are distributed internationally, with high concentration in particular stages. Taiwan is central to advanced fabrication, but no single location contains the entire chain. A new factory requires more than a building and a machine: skilled people, reliable utilities, suppliers and production knowledge must work together. Replacing capacity can mean reconstructing an industrial ecosystem rather than ordering from another catalogue.

Commercial efficiency and security can therefore pull apart. A firm may prefer one proven supplier to several expensive alternatives. A government may value the ability to continue production after that supplier fails. Inventories, spare capacity and alternative routes have costs in ordinary years. Yet blanket self-sufficiency can also waste resources and create new domestic bottlenecks. Resilience is a design problem tied to a specific failure, its consequences and the available means of recovery.

Using leverage changes the relationship that created it. A target may invest in substitutes; partners may reconsider their exposure to a jurisdiction; firms may redesign products. These responses can be slow, costly or unsuccessful. An effective restriction today may nevertheless reduce tomorrow's dependence, while a threat never used may continue to influence behaviour. The coercer must assess the target's workable alternatives, including those the restriction gives it reason to build.

Adaptation Remakes the Strategic Map

During the drought of 2023 and 2024, the Panama Canal restricted transits and vessel draughts as water became scarce. The canal had not moved. Ships and trade routes had not become obsolete. A passage between oceans had encountered a limit in the freshwater system on which its locks depended.

Engineering had overcome one geographical obstacle by creating dependence on another. Railways reduce the cost of crossing land while concentrating movement at bridges and terminals. Aircraft extend reach while depending on airfields, maintenance and fuel. A pipeline bypasses a difficult sea route and commits its users to a fixed land route. Each innovation changes the useful map without removing physical constraints.

Digital systems do the same. International communications depend heavily on undersea cables, landing stations, electricity and repair capacity. The information may travel quickly; a damaged cable still requires diagnosis, equipment, permission and a suitable repair vessel. Many cable failures are accidents rather than attacks. Their consequences nevertheless depend on

where alternative connections exist and how rapidly traffic or repairs can be arranged. A network's resilience is geographically uneven, particularly for places relying on few connections.

Technology also changes what is valuable. Energy systems based increasingly on electricity, batteries and renewable generation alter demand for fuels and materials. This does not replace oil dependence with independence. Mines, mineral processing, manufacturing and grid equipment have different concentrations. Possessing mineral deposits is not the same as controlling refining or producing usable components. A mining country can seek more local value, but processing requires power, skills, finance and buyers. The bargaining position changes only when those complements can be assembled.

Climate adds pressure to these built systems. Heat, water scarcity, flooding and sea-level change affect infrastructure and livelihoods differently by location. Their political effects depend on exposure, institutions and adaptation, rather than following one automatic route to conflict. The Panama episode demonstrates water dependence; it does not by itself establish how much human-caused climate change contributed to that particular drought. For strategic purposes, the operational question remains concrete: which service fails under which conditions, and which alternative continues to work?

Responses to insecurity can alter relationships as much as inventions do. An importer diversifies after a supply threat. A neighbour seeks partners after an invasion. A government finances a second port because a single route has become politically intolerable. These choices redistribute traffic, revenue and influence. The initial advantage may survive, weaken or move to another stage of the system. Adaptation is not assured, but treating others as permanently unable to respond is a serious analytical error.

There is a further cost. Two sides can each purchase greater protection while making cooperation more difficult. Duplicated production may be expensive. Rival technical systems can reduce compatibility. An alternative corridor can expose communities and ecosystems to new burdens. A policy

that makes one country less vulnerable may transfer risk rather than remove it. Resilience needs an account of who pays, including people outside the government or company making the decision.

Geography helped concentrate activity where movement was cheap. Those concentrations created advantages and vulnerabilities; efforts to exploit or escape them changed where activity went. The practical map is therefore neither fixed destiny nor infinitely adjustable. It is the changing result of physical conditions, accumulated investment and choices made in response to other people's choices.

How It Actually Works

A canal and a failed assertion of power

In July 1956, Egypt's president, Gamal Abdel Nasser, nationalised the Suez Canal Company. Britain and France wanted control restored and secretly agreed a plan with Israel. Israel would attack Egypt; Britain and France would then intervene to separate the combatants whose war they had helped arrange. The operation began in October. Its architects had forces capable of advancing on the canal, but a military plan could not supply the political conditions in which victory would stick.

The United States opposed the invasion and applied diplomatic and financial pressure. Britain's government was determined to defend the pound's exchange rate, and pressure on sterling was draining the reserves needed to do it. Washington made financial support conditional on withdrawal. Britain could send troops to Egypt, but it could not command its ally to support the currency paying for them. British and French forces left in December 1956; Israel completed its withdrawal in March 1957. Egypt retained the nationalised canal, although the conflict had closed the waterway and inflicted destruction on Egyptian territory.

The failure crossed several maps at once. On the military map, Britain and France could project force. On the financial map, Britain depended on relationships it had endangered. On the political map, Egyptian sovereignty

and Arab nationalism made the canal more than an asset to be administered by whichever power could seize it. Alliance did not mean that Washington would approve a partner's war. Access to a passage did not confer a right to govern the country containing it.

The canal was the conspicuous object in the dispute. Some of the decisive constraints lay thousands of miles away, in the willingness of another government to extend support. Britain and France had planned to use a narrow waterway to reassert their position. The attempt exposed how much that position now depended on someone else's agreement.

The search for a master map

Earlier strategists had tried to explain the distribution of power on a global scale. Alfred Thayer Mahan's *The Influence of Sea Power upon History*, published in 1890, treated maritime strength as a system joining commerce, naval forces and the resources supporting them. His historical argument made British success look less like a succession of brilliant admirals and more like a sustained capacity to use the sea. It also offered an ambitious United States a model worth studying.

In 1904, the British geographer Halford Mackinder examined a different technological change. Railways might allow an industrial power to organise the great Eurasian interior beyond the easy reach of maritime blockade. His heartland argument was a warning about a possible combination of resources, movement and political control. Later shorthand turned it into a promise that possession of one region would deliver world domination. That version removed much of the work required to connect territory to power.

Nicholas Spykman's *The Geography of the Peace*, published in 1944, shifted attention towards the populated coastal margins of Eurasia, the rimland between the continental interior and the surrounding seas. The practical concern was the balance of power: a state dominating these regions could threaten the position of powers outside them. Heartland and rimland were competing organising models, not geographical discoveries with the status of a mountain range.

Their value lay in directing attention towards relationships that a national map concealed. Their danger lay in encouraging observers to regard inhabited regions as pieces of a larger strategic arrangement. Imperial versions of geopolitics could present expansion as a natural requirement rather than a political project. In interwar Germany, geographical language became entangled with arguments for territorial expansion. Nazi conquest and racial extermination cannot be explained by a map theory, but claims about necessary space helped dress domination as destiny.

Later critical geopolitics challenged the authority of this supposedly detached view. Labels such as heartland, buffer and sphere of influence select whose security is central and whose society becomes surrounding territory. The correction does not make physical constraints imaginary. It asks who has described them, which choices the description makes appear reasonable and who disappears from the picture. Reading the world's fault lines requires both kinds of attention: the material difficulty of acting and the political framing of what action is for.

The divided world was never divided neatly

After the Second World War, the United States and Soviet Union emerged as the central military and ideological rivals. Nuclear weapons changed the consequences of direct conflict. The United Nations, founded in 1945, supplied a framework of sovereign equality and collective security, but the Security Council also preserved special powers for the wartime victors. The new order contained a principle of common rules and a hierarchy capable of blocking their enforcement.

Berlin showed how a local position could concentrate the larger contest. The Western sectors lay inside the Soviet occupation zone of Germany. When Soviet authorities blocked surface access in 1948, the Western powers supplied the city by air. The blockade ended in May 1949, although the airlift continued afterwards. Access depended on usable corridors, aircraft, airfields, maintenance and sustained political commitment. The issue was also credibility: abandoning the city would change expectations elsewhere.

NATO was founded in 1949. The Soviet-led Warsaw Pact followed in 1955. In Europe, alliances and forward forces made a local attack potentially wider. Their machinery could deter an opponent, but it also meant that crisis management involved commitments accumulated before the crisis began. A government could not consider one deployment without considering how its allies and adversaries would interpret the change.

The Cuban missile crisis in 1962 brought this interaction close to catastrophe. Soviet missiles in Cuba altered the threat perceived by the United States. Washington imposed a naval quarantine and demanded their removal. The settlement combined Soviet withdrawal with an American assurance against invasion of Cuba and a privately communicated undertaking concerning the removal of American Jupiter missiles from Turkey. A public account of one side standing firm misses the bargaining that helped end the confrontation.

The distinction matters beyond this episode. A concession may be politically possible when it is not advertised as surrender. A public ultimatum may reduce the room in which a government can retreat. The forces deployed during bargaining can generate incidents that neither side planned. Deterrence does not suspend diplomacy; it creates circumstances in which the terms and communication of a bargain can determine whether armed pressure stops.

Outside Europe, the two-colour image was even less adequate. Decolonisation produced states seeking room to govern and develop, not merely places for superpowers to recruit. The Non-Aligned Movement, founded in 1961, expressed an effort to resist compulsory attachment to either bloc. Its members had different institutions and interests, and non-alignment did not mean equal distance on every issue. Local leaders could seek assistance from a major power without accepting that power's entire programme.

Wars in Asia and Africa therefore combined local struggles with outside intervention. Calling them proxy wars can identify sponsorship while concealing the agency of those fighting. A supplier may hope to direct a

client and discover that local priorities prevail. The same problem appeared at Suez: the smaller country's politics could not be inferred from the larger powers' agreement about what should happen there.

Oil added a different form of pressure. During the Arab-Israeli war of 1973, Arab producers imposed supply cuts and an embargo on selected countries, including the United States. Import dependence became an immediate political problem. Consumers could not replace established energy systems overnight, but they could begin changing the conditions of the next confrontation. The International Energy Agency was created in 1974 to organise cooperation, including emergency responses to oil supply disruption. The episode exposed producer leverage and prompted a collective consumer response. It did not establish that either side could dictate all the other's foreign-policy choices.

Integration after the Soviet collapse

The Soviet Union dissolved in 1991. The United States retained an exceptional capacity to deploy forces internationally, while markets, investment and communications connected economies more closely. China's accession to the World Trade Organization in 2001 marked an important stage in its integration into a system it would increasingly help shape. Neither development erased differences in regime, national purpose or strategic interest.

Production crossed borders in stages. A product could depend on design, machinery, components and assembly located in different jurisdictions. Firms gained access to larger markets and specialised suppliers. Governments gained prosperity and new vulnerabilities. Dependence could remain unobtrusive while relations were cooperative, then become visible when licences, finance or transport were restricted.

The wars in Afghanistan and Iraq exposed another limit. Removing a government and sustaining a political order acceptable to local people required different capabilities. Military superiority could not supply legitimate institutions on demand. Meanwhile, commercial integration did not make

every participant accept the same security arrangements. The expectation that wealth would converge on one political model proved an unsafe foundation for strategy.

Territorial coercion now operated alongside sophisticated economic networks. Governments could trade with a rival while restricting its access to technology and preparing to resist its forces.

Europe: invasion, resistance and wider commitments

Russia's seizure and annexation of Crimea in 2014 and its full-scale invasion of Ukraine in February 2022 made the limits of European security arrangements unmistakable. Ukraine was an independent state whose alignment and political future Russia sought to constrain by force. The United Nations General Assembly condemned the 2022 aggression and demanded Russian withdrawal. Describing Ukraine as a buffer does not change that legal and political relationship.

Russia's leadership presented NATO enlargement and Western involvement as threats. Analysts differ over the relative weight of security fears, imperial nationalism, regime interests and particular leadership decisions. Those are disagreements about explanation, not evidence that Ukraine lacked agency or that the invasion was inevitable. Ukrainians' resistance changed what Russian forces could achieve and what outside governments were prepared to support.

Geography then shaped implementation. A long frontier created multiple approaches. Roads, railways, bridges and supply depots influenced the ability to sustain forces. Black Sea access connected military action to grain exports and shipping risk. Strikes on electricity infrastructure affected civilian life as well as wartime production. A national map could show occupied ground without revealing whether the forces holding it could be replenished or whether the population accepted their authority.

For Ukraine's supporters, assistance involved a further calculation: how to help resist conquest while managing the risk of direct conflict with a

nuclear-armed state. Delivering equipment required production, training, repair and political authorisation, not a pledge alone. Economic sanctions added pressure through different channels, with outcomes depending on enforcement and the alternatives available to Russia. No single measure supplied a complete theory of victory or settlement.

The invasion also changed neighbouring choices. Finland joined NATO in April 2023 and Sweden in March 2024 after abandoning military non-alignment. Their decisions did not follow automatically from latitude or proximity to Russia; earlier governments had chosen differently under different conditions. This is the feedback that static geopolitics misses. An attempt to improve a state's strategic position can induce other states to adopt arrangements it opposes.

The Indo-Pacific: several disputes, overlapping systems

Taiwan concentrates a different combination of risks. It is governed separately from the People's Republic of China and has its own democratic institutions. Beijing claims it as part of China and has explicitly retained the option of force. The disagreement concerns political authority and identity before it concerns semiconductor factories. Treating the island only as a strategic asset removes the society whose future is at issue.

The strait affects the means available. A large invasion would require movement and sustainment across water against resistance. Blockade or other coercive measures would present different operational, legal and escalation problems. These are possible forms of pressure, not predictions that one will occur. Capability assessments depend on assumptions about preparation, warning, outside involvement and how forces perform under attack. A map cannot select the answer.

The United States supports Taiwan through a deliberately particular arrangement. The Taiwan Relations Act provides a basis for defensive arms and maintaining the capacity to resist coercion. It is not a mutual defence treaty promising an automatic American military response. The difference

creates uncertainty for both deterrence and planning. Governments must consider what the United States might do, what it could do in time and how actions around Taiwan would affect its other relationships.

Semiconductor production widens the consequences without determining policy. A disruption to advanced fabrication could pass through electronics and industrial supply chains far beyond the island. Yet the factories also depend on foreign equipment, materials, customers and expertise. Their importance cannot be reduced to a prize that an invader could acquire intact. War would endanger the people and connected operations that make production valuable.

The South China Sea is a related but distinct dispute. Coastal states contest maritime rights and sovereignty over features, while outside powers have interests in navigation and regional security. Fisheries and resource access shape the livelihoods of people working at sea as well as naval planning. An exclusive economic zone gives specified rights over resources; it is not identical to territorial sovereignty over every vessel passing through the area.

The Philippines' arbitration against China produced a 2016 award clarifying maritime entitlements and finding important Chinese claims and conduct inconsistent with the Law of the Sea Convention. It did not decide sovereignty over islands or draw a maritime boundary. China rejected the award. The gap between legal determination and conduct did not make the legal distinction meaningless: it gave the Philippines and other governments a clearer basis on which to contest particular claims.

India's position prevents the region from becoming a two-player diagram. It participates in the Quad with Australia, Japan and the United States, cooperating on matters including maritime security and infrastructure. The grouping is not an Asian copy of NATO's mutual defence commitment. India also has its own continental security concerns, including relations with China and Pakistan, and its own development priorities. Participation in one arrangement does not settle every other relationship.

The wider Indo-Pacific consequently contains allies, rivals and states trying to preserve several options. Investment, export markets and security partnerships do not always point in the same direction. A small government may fear coercion and still judge a major power indispensable as a customer. Understanding that choice requires its dependence and alternatives, rather than a demand that every country acquire the same colour on an alliance map.

The Middle East and the politics of shared water

The Persian Gulf connects rival states to the same vulnerable exit. In 2025, before the 2026 disruption, roughly twenty-one million barrels of oil per day passed through Hormuz, according to the EIA's later quarterly estimates. That is a flow of oil, not a measure of all Gulf commerce or a claim about traffic during the crisis. Exporters, importing countries and shipping firms enter the same passage with different stakes and different alternatives.

Iran's position beside the strait does not make closure costless or give it ownership of international passage. Gulf exporters have interests in reliable access; outside powers have interests in preventing disruption; crews and commercial operators must assess the immediate danger. Escorts, threats, insurance decisions and alternative routes interact. A passage can remain physically navigable while becoming commercially unacceptable to some users. Conversely, a legal assurance cannot make a vessel invulnerable.

The region's conflicts cannot be compressed into oil or a single religious divide. Israel and the Palestinians present questions of security, displacement, occupation and self-determination that have their own histories and political actors. In its 2024 advisory opinion, the International Court of Justice concluded that Israel's continued presence in the Occupied Palestinian Territory was unlawful and addressed the violation of Palestinian self-determination. An advisory opinion is not a military enforcement mechanism. Its legal conclusions nevertheless cannot be replaced by the observation that a territory is strategically useful.

Regional powers, armed non-state organisations and external supporters

connect these conflicts to wider rivalries without controlling every participant. Sponsorship supplies resources and influence; it need not produce obedience. Civilian protection is not answered by identifying which coalition benefits. The people exposed to violence have rights that do not depend on their usefulness to a strategic account.

Farther south, the Grand Ethiopian Renaissance Dam on the Blue Nile shows a different kind of fault line. Ethiopia's hydropower ambitions meet downstream concerns in Sudan and Egypt. Generating electricity passes water through turbines rather than consuming the entire flow, but storage and release decisions change its timing. Prolonged drought and the subsequent refilling of reservoirs make coordination particularly consequential.

Research modelling these operations identifies possible gains and serious risks under different conditions. It does not prove that a political agreement has solved them or that upstream dams have one universal effect. The practical questions concern drought rules, information sharing, releases and compensation. Neither military size nor an inherited claim to water can make the hydrology disappear. African states are making consequential choices within this system; they are not merely the ground on which outsiders compete.

How we know

Geopolitics leaves several kinds of evidence, each answering a different question. Treaties establish commitments, while deployments and expenditure show only part of the ability to fulfil them. Trade and shipping data reveal flows, but firms can change routes and tracking signals can be missing or manipulated. Satellite images show equipment or construction more readily than readiness, consent or intention.

Government statements establish declared positions. They are not independent proof that those positions explain a decision. Archives, parliamentary records, memoirs and scholarship can reconstruct choices more closely, although access is uneven and participants have reputations

to defend. The public and private components of the Cuban settlement demonstrate why the most visible account can omit something decisive.

Models help compare possibilities. A reservoir simulation can test a drought rule; a military scenario can expose a logistical limit. Neither is a forecast without additional assumptions. Reliable analysis keeps the observed event separate from its proposed explanation and from what might happen next. It also asks whose evidence is missing, especially when official records describe territory more thoroughly than the people living there.

What People Get Wrong

“Geography is destiny”

The slogan is persuasive because some constraints endure longer than governments. Russia remains large. Britain remains an island. The Himalayas do not respond to elections. Predictions built from those facts can feel more solid than explanations involving changing institutions or leaders.

They are often less precise. The English Channel has hindered invasion and supported commerce. Railways changed the costs that mattered to Mackinder's argument; aircraft changed them again. A mountain barrier may protect a population while separating it from markets. None of these observations yields one inevitable policy. The missing steps are the objective, the available capabilities and the response of other actors.

Scale matters too. A region can be difficult for an army to cross and commercially connected by air. A physical feature explains something only after the task has been specified.

The correction matters because destiny can excuse decisions that should be examined. A state's desire to control its approaches does not establish a right to rule the people living there. Durable constraints deserve attention. They do not turn the preferred option of one government into an instruction issued by the planet.

“A chokepoint gives its owner a tap”

A coloured map makes the land beside a strait look like control over the water. The image suggests that one government can close a passage and reopen it when its demands are met. It confuses the capacity to interfere with the ability to govern the whole response.

Even an accidental blockage exposes the distinction. The *Ever Given* obstructed the Suez Canal from 23 to 29 March 2021. It revealed concentration without any government gaining a useful bargaining position. The work that restored movement was salvage, not diplomatic surrender. Dependence on a narrow route was real; the reason it failed still mattered.

Deliberate interference adds opponents, retaliation and the interrupter's own dependence. Exporters may need the passage they threaten. Shipping firms and insurers can avoid some risks, while other states can seek protection or alternatives. A route can become expensive without stopping, and a physical opening can remain commercially unattractive.

Canals, straits and specialised suppliers also offer different substitutes. A vessel able to sail around Africa cannot thereby bypass the exit from the Persian Gulf. Analysis must identify the particular cargo and route. The useful question is who can interrupt which flow, for how long and against what response, not who appears to possess a universal valve.

“Trade prevents war”

The proposition starts from a sound mechanism. War destroys assets, interrupts transactions and sacrifices future income. Businesses and households that benefit from exchange have reasons to prefer peace. The error is treating those reasons as the only ones governments possess, or assuming that the people bearing the losses control the decision.

Commercial ties between Russia and European economies did not prevent the invasion of Ukraine. That observation does not prove the ties had no restraining effect, because the alternative history cannot be observed. It does disprove a guarantee. A government can value political control more

than expected income, miscalculate the duration of war or expect others to bear much of the cost.

The relationship can also become a source of fear. Dependence on foreign supplies may look tolerable while intentions seem benign and dangerous when future access is uncertain. Restricting commerce can then appear to purchase security, even when it reduces prosperity. The dispute concerns the price of vulnerability as well as the gains from exchange.

Trade is therefore neither an automatic peace treaty nor evidence of political friendship. Its effects depend on who gains, who can adapt and how governments rank the disputed objective. Counting transactions without examining those questions can make a deeply connected world look safer than its decision-makers consider it.

“A Chinese-financed port is a Chinese military base”

Ports can support naval access, and states have legitimate reasons to examine who finances and operates them. The shortcut is to treat a loan, commercial lease, ownership stake and military access agreement as the same transaction. Each creates different rights. A port operator may control terminal activity without possessing sovereignty or the right to admit foreign forces against the host government's wishes.

Hambantota in Sri Lanka became the emblem of this confusion. Its 2017 lease to a Chinese state-owned commercial operator is often described as China seizing the port when Sri Lanka could not repay a loan. Research into the transaction found that it was not a debt-for-asset swap: the original debt was not extinguished by transferring the lease. Sri Lankan political choices and financial pressures were part of the account, rather than merely the execution of a foreign master plan.

That correction does not establish that Chinese lending is harmless or that commercial infrastructure has no strategic value. Long leases, financial dependence, dual-use facilities and political relationships can alter bargaining power. They require examination of the actual terms and

subsequent conduct.

The distinction protects analysis in both directions. Suspicion should not manufacture a base where only commercial rights have been established. A commercial label should not prevent scrutiny of later military use. The question is which permissions exist, who can change them and what evidence shows that they have been exercised.

“International law is irrelevant without a world government”

Powerful states can violate legal rules and escape immediate enforcement. It is tempting to conclude that the rules contribute nothing. That inference mistakes the absence of reliable coercion for the absence of any effect.

The 2016 South China Sea arbitration illustrates both the reach and the limit. A tribunal constituted under the Law of the Sea Convention determined maritime questions brought by the Philippines against China. The award is final and binding between the parties under the Convention; China rejected it. The tribunal did not decide sovereignty over islands or delimit a maritime boundary. Saying that it awarded the whole sea to one side would misstate the result as badly as saying it addressed nothing.

Legal findings can clarify which conduct other governments are being asked to support, recognise or resist. They can affect diplomatic coordination and the credibility of claims. Those mechanisms differ from a court possessing its own navy. The effects may be inadequate to stop a violation, but inadequacy is not non-existence.

Nor does identifying strategic interests settle the law. A route can be indispensable to a state without belonging to it. A territory can improve a military position without being available for annexation. Geopolitical explanation becomes worse, not more hard-headed, when it silently replaces rights with the capacity to override them.

“Nuclear weapons make major war impossible”

No nuclear weapon has been used in war since 1945. The prospect of retaliation gives governments a powerful reason to avoid attacks that could trigger catastrophic escalation. The record supports taking deterrence seriously, not treating it as a physical law.

Nuclear-armed states have still faced conventional clashes, coercion and serious crises. They must interpret warnings, maintain command systems and decide what an opponent regards as vital. Restraint depends on those judgements. A state may also believe that its arsenal limits outside intervention while it pursues conventional aggression. Deterrence can inhibit one form of violence while creating confidence to attempt another.

The measurement problem is important. When an attack does not happen, deterrence may have worked, but the attacker may also have lacked interest or capability. The absence of war cannot identify a single cause. Conversely, one crisis ending peacefully does not establish that its management was safe throughout.

SIPRI's 2026 assessment describes heightened escalation risks alongside an increasing focus on nuclear weapons. The appropriate conclusion is neither inevitable disaster nor automatic safety. Nuclear deterrence is a continuing effort to shape choices under uncertainty. Treating it as a guarantee removes attention from the decisions and safeguards on which the claimed protection depends.

“Every crisis is a new Cold War”

The analogy offers instant order: opposing blocs, ideological competition, proxy conflicts and a remembered ending. It can make a new situation feel understood before its relationships have been examined.

The Cold War was already less tidy. Non-aligned governments pursued their own objectives, clients resisted patrons and local conflicts had causes that exceeded superpower competition. Starting from an imaginary past compounds the error of applying it to the present.

There are useful comparisons. Arms races, alliance uncertainty and local crises with wider commitments remain intelligible through Cold War experience. But contemporary production networks can connect rivals through several indispensable stages of the same product. A government may cooperate on maritime security with states from which it differs on trade or another conflict. Alignment on one issue does not identify a permanent position on every issue.

An analogy should therefore specify the mechanism being borrowed. Is the resemblance an arms race, a commitment problem or a contest over institutions? Which differences might change the result? Without those questions, the label encourages policies designed for the wrong structure. The lesson of a previous period becomes useful when it identifies something to test, not when it supplies the ending in advance.

Use It

Separate the claim from the control

A report that a state controls a place can mean several different things. Its government may assert sovereignty, administer the territory, operate a facility, dominate access or possess enough force to disrupt someone else's use. Those conditions are not interchangeable. Begin by identifying which one the evidence establishes.

A port transaction is a useful test. Find the parties, the rights transferred, the duration and the authority retaining security responsibilities. Then examine access in practice. A lease may matter greatly without constituting annexation. A claim of sovereignty may matter politically without providing effective control. In disputed waters, the legal status of an island, a maritime zone and the activities permitted there can involve different questions.

This distinction prevents a dramatic headline from completing an argument it has barely begun. It also keeps law separate from prediction. A legal entitlement does not guarantee enforcement, and the ability to seize something does not create an entitlement. The useful picture shows the

claim, the actual conduct and the institutions through which either might change.

Follow the conversion into action

When a country is described as powerful, identify the task. A large navy may be relevant to one operation and poorly suited to another. Wealth can finance equipment without making trained crews available. An ally can approve assistance without having a usable route for delivering it.

Follow the chain far enough to locate the constraint. For a sustained deployment, the missing element might be maintenance or host-country permission. For industrial output, it might be reliable electricity, a specialised machine or a qualified supplier. For a negotiated settlement, it might be the government's inability to obtain consent at home. Find the constraint that would prevent the proposed action from producing its claimed result.

Turkey's 2003 vote supplies the standard of proof. The useful territory and alliance relationship existed. The authorisation for the particular deployment did not. Once a description has moved from resources to decisions and implementation, the analysis can explain why an apparent advantage was usable, conditional or unavailable.

Distinguish the initial shock from the adjustment

A dramatic interruption is not a complete measure of vulnerability. Examine the response available after the initial disruption: replacement supply, different routes, changes in demand and the institutions needed to make them work. Ask what adjustment costs, rather than assuming that it happens because time passes.

Consider a hypothetical manufacturer buying from two suppliers. That arrangement looks diversified until both suppliers are found to depend on the same specialist component producer. Holding extra finished components may buy time. It does not create another producer, trained staff or permission to use protected technology. A proposed remedy needs to match the actual failure.

The same discipline applies at national scale. A reserve is a stock; normal consumption is a flow. A new import terminal has a construction schedule and needs supplies that can reach it. A substitute may be technically possible but too expensive to deploy widely. The relevant question is what remains unavailable, costly or politically unacceptable after feasible adjustment, not whether an alternative can be named.

Test the response to the response

A policy is announced in one capital and implemented in a world containing other decision-makers. The first intended effect is only the beginning. A military deployment may reassure an ally and alarm a neighbour. A restriction may deny a technology and encourage investment in a replacement. Pressure intended to weaken a coalition may give its members a stronger reason to cooperate.

Develop at least one plausible response that does not cooperate with the policy's stated purpose. Then ask whether the original objective survives it. This is not a demand to imagine every possibility or to assign invented probabilities. It is a check against analysis in which only one actor is allowed to choose.

Also distinguish capability from intention. Equipment can enable several actions. A statement may describe a genuine objective, a bargaining position or an attempt to influence an audience. Prefer evidence that discriminates among interpretations: a change in deployment, resources committed, an agreement implemented or a costly concession. Repeated language is not independent confirmation.

Identify the bargain and the decision-maker

A demand to demonstrate strength is not yet a strategy. Identify what another actor is being asked to do and what would happen after compliance. Deterrence seeks restraint. Compellence seeks a change. An offer that supplies no credible end to pressure may leave the target little reason to accept it.

Then open the country outline. Who can authorise the required action? Who can block it? Which institution must carry it out, and which audience must tolerate the result? A foreign ministry may negotiate terms that a legislature will reject. A leader may accept a material loss rather than endanger a supporting coalition. An agreement with a patron may fail to bind the local organisation expected to obey it.

Claims about prestige or national character cannot substitute for identifying incentives and authority. Where the decisive private calculation remains hidden, state the observable constraint and leave the motive uncertain.

Trace where the costs land

A country gaining leverage does not mean that everyone inside it gains. A policy can protect an industry while making inputs dearer elsewhere. An alternative transport corridor can improve national access while imposing local environmental or social costs. A government may regard a confrontation as manageable because much of its burden falls on people outside the institutions deciding it.

Follow those costs beyond the national average. Who loses access to work, water, food, reliable power or safe passage? Which firms can pass on a price increase, and which households cannot? Who provides the labour and infrastructure through which the policy operates? A useful geopolitical account includes those relationships because they affect cooperation, resistance and endurance, as well as because the people concerned matter in their own right.

The seafarer and the cargo owner need not experience the same improvement. An insurance arrangement might protect the owner's balance sheet while leaving a crew exposed to physical danger. A different route might protect the crew but raise transport costs for customers with little room to pay more. These are illustrative possibilities, not claims about one vessel. They show why a solution has to specify whose exposure it reduces and whose circumstances pay for the change.

The limits

These lenses will not produce a reliable timetable for war. Leadership decisions, intelligence failures, accidents and local resistance can change an outcome that looked likely. A scenario is a conditional account, not a forecast merely because its sequence is detailed. Uncertainty should be attached to the disputed step rather than spread over everything indiscriminately.

Compression has another limit. Understanding why territory matters strategically does not supply a full account of its history, inhabitants or law. The framework can identify a question that needs regional expertise; it cannot replace that expertise. Nor does explanation settle moral judgement. A policy can follow a coherent calculation and remain unlawful or destructive.

Finally, maps and statistics are selective. A shipping estimate can miss obscured traffic. An expenditure figure can conceal poor readiness. Public declarations can differ from private bargaining. The remedy is to match the evidence to the proposition, not to assume that all accounts are equally unreliable. Some facts are well established even when motives or future consequences are not.

The one thing to keep

Return to the seafarers unable to leave the Persian Gulf safely. Their predicament was not caused by the width of a strait alone. The narrow passage concentrated dependence. Violence and threats changed the risks of using it. Commercial decisions, military choices and legal obligations then shaped what movement remained possible. The route that made their work economical had become a point through which decisions elsewhere reached their lives.

Look at the same map again and a strait should no longer seem powerful by itself. Its importance rests on ships that need it, people who work those ships and decisions that can make passage possible or intolerable. None of this makes danger easy to remove. It does make inevitability harder to sell.

Between the coastline and the consequence lie choices, including choices made by people the largest powers cannot command. The map can show where the seafarers were trapped. Understanding power means asking what kept them there, whose interests that served and what would allow them to leave.

Terms

Geopolitics. The study and practice of power through territory, distance, position and connected systems. It examines constraints and the descriptions that make spatial claims seem necessary.

Geostrategy. A plan for pursuing political objectives through geographical and network conditions. Geostrategy concerns the choice of where and how to act.

Sovereignty. A state's legal authority and independence within the international order. Sovereign status does not guarantee effective control, unlimited freedom or equal power, especially under occupation or contested authority.

State capacity. The ability of public institutions to implement decisions, raise resources and provide or enforce services. It turns assets into usable power without establishing a policy's wisdom or legitimacy.

Legitimacy. Acceptance that an authority, rule or action is rightful. It can make cooperation easier and coercion less necessary. Legitimacy is distinct from popularity, military strength and the ability to impose obedience.

Sphere of influence. An area in which a powerful state expects privileged control over other states' alignments or choices. The phrase describes a hierarchical claim, not a legal entitlement to that control.

Buffer state. A country between stronger rivals whose separation can reduce direct contact. Its inhabitants and government have their own interests; being useful as a buffer does not erase their political agency.

Heartland. The Eurasian interior in Mackinder's strategic model, whose

potential he associated with railways and concentrated continental resources. It is a historical argument, not a guarantee of world supremacy.

Rimland. Spykman's name for Eurasia's coastal margins, where populations, resources and continental and maritime power meet. The concept shifts attention from the interior towards the balance around its edges.

Sea power. The capacity to use maritime commerce, naval forces, ports and supporting resources together. Access, repair, supply and commercial activity help determine a fleet's value.

Chokepoint. A narrow passage or concentrated node carrying important flows. Its strategic importance depends on substitutability, interruption costs and countermeasures. Straits and specialised suppliers can create analogous dependencies.

Strategic depth. Space and supporting capacity that help an actor absorb attack and preserve options. Distance matters only where forces, infrastructure and political authority can use it to continue resisting.

Power projection. The ability to produce military effects beyond a state's immediate territory. It depends on access and sustainment as well as weapons range; reaching a place is different from operating there continuously.

Logistics. The provision, movement and maintenance of personnel, equipment and supplies. It connects nominal military strength to sustained operations and can constrain what a force achieves after an initial advance.

Interoperability. The ability of separate forces or systems to work together. Compatible communications, equipment, procedures and permissions make a coalition more than the sum of inventories that cannot be used jointly.

Security dilemma. A situation in which preparations intended to increase one actor's security make others less secure and prompt countermeasures. It explains a particular interaction, not every act of aggression.

Deterrence. An attempt to prevent action by making its expected failure or cost unacceptable. It depends on what the opponent believes, so possession of a capability alone does not demonstrate deterrent success.

Compellence. Pressure intended to make another actor begin, stop or reverse an action. It needs a clear demand and a credible account of what follows compliance.

Alliance. A security commitment among states. Its practical effect depends on the contingencies covered, promised assistance, available forces, political authorisation and expectations about how members will respond in a crisis.

Extended deterrence. Deterrence provided on behalf of an ally or partner, potentially including nuclear protection. Its credibility involves persuading an opponent that the protector may accept serious costs for another state's security.

Hedging. Maintaining several relationships or options to reduce dependence on one partner. A state can cooperate economically with one power and strategically with another without accepting either's entire programme.

Escalation. An increase in the intensity, geographical scope or stakes of a confrontation. It may be deliberate or unintended, and actions across military, economic and political domains can affect one another.

Grey-zone action. Coercion designed to remain below an expected threshold for open war or major retaliation. Ambiguity can be part of the method; the label does not establish legality or harmlessness.

Interdependence. A relationship in which changes or interruptions impose costs on more than one participant. Mutual benefit does not imply equal dependence, equal bargaining power or equal access to alternatives.

Sensitivity. The costs generated by external change within existing policies and arrangements. It concerns responsiveness to disruption before the framework is altered, rather than the full cost after feasible adjustment.

Vulnerability. Exposure assessed in light of available alternatives and policy changes, including their costs. Time is relevant because adaptation takes time, but waiting alone does not create a workable substitute.

Economic statecraft. The use of trade, finance, investment, aid or technological access for political purposes. The appropriate test depends on the intended outcome, not merely the economic damage produced.

Sanctions. Restrictions used to deny resources, impose costs or influence conduct. Their design, jurisdiction and enforcement vary; punishment, signalling and inducing a policy change are different objectives requiring different assessments.

Exclusive economic zone. A maritime zone, normally extending up to 200 nautical miles from relevant baselines, in which a coastal state has specified resource rights and jurisdiction. It is not equivalent to territorial sovereignty.

Resilience. The ability to absorb disruption, adapt and continue essential functions. Inventories and alternatives can help, but resilience must be assessed against a specified failure rather than inferred from domestic production alone.

Go Deeper

The orientation. Klaus Dodds, *Geopolitics: A Very Short Introduction*, third edition (2019). Start here. Dodds is a useful antidote to the sort of certainty that comes with a large map and a television microphone. He connects classical theories, territorial politics, popular culture and critical geopolitics, showing how descriptions of danger help produce political space. It is brief, conceptually useful and written for a newcomer. Its breadth means that logistics, alliances and economic networks receive less operating detail than they do in this book. Its best reward is the moment a familiar strategic phrase stops looking like a fact of nature.

The original argument. Halford J. Mackinder, “The Geographical Pivot of History” (1904). This paper is short enough to read in one sitting and important enough to have been misquoted for a century. Read it to watch a

strategic model being built around railways, sea power and Eurasia before later summaries hardened it into destiny. The language, imperial interests and racial assumptions belong to its period. His warnings depend on combinations of capability and alliance, but he also makes sweeping claims about fixed geography and peoples. Read both together, treating him neither as an oracle nor as a harmless technician. The paper shows how a technology, a map and a political anxiety can become one theory. Notice how much certainty the familiar slogan gains by leaving his conditions behind.

The full course. Colin Flint, *Introduction to Geopolitics*, fourth edition (2022). Flint provides a systematic next step, moving across scale, agency, territoriality, nationalism, networks and conflict. It is a university textbook, so expect more concepts, case material and explicit analytical machinery than narrative momentum. Use it to place the relationships examined here within a wider academic field, then follow its references into a particular region or type of contest that has caught your interest. The exercises and chapter structure make it better for deliberate study than for a continuous weekend read.

The corrective. Gearóid Ó Tuathail, *Critical Geopolitics: The Politics of Writing Global Space* (1996). Read this after the classical texts, not instead of them. Ó Tuathail asks who gets to describe the world, how maps and strategic language divide it into centres, peripheries and threats, and what political work those descriptions perform. The prose is theoretical and the argument comes from a particular scholarly tradition. It is a sustained challenge to the idea that geopolitical experts merely discover facts already waiting on the map. Its lasting question is practical: whose description of space becomes policy, and which people become invisible when that description wins?

Notes and Sources

Current and changeable material was checked on 5 September 2026. Dated episodes are snapshots, not claims about conditions on the day of publication. These notes identify the evidence behind the book's main mechanisms and memorable claims. The regional examples explain selected relationships rather than supply complete national histories or forecasts.

The Whole Thing in One Page and Why You Should Care

The Hormuz opening. The International Maritime Organization's statement of 28 August 2026 directly reports nineteen verified seafarer deaths and around six thousand seafarers on up to four hundred ships unable to leave the Persian Gulf safely. The date belongs to the statement and its reported position. The figures are neither a complete casualty census nor a continuously updated September total. No dialogue, shipboard scene or individual seafarer's experience has been invented.

What geography can explain. Dodds, Flint and Ó Tuathail inform the distinction between physical constraint, political representation and choice. The book's conversion-and-response model is a synthesis, not a named theory attributed to any one author. Examples involving an unnamed aircraft, factory, importer or force are analytical illustrations, not reported cases.

The Core Ideas

Space, capacity and logistics. Mahan's account of sea power treats commerce, naval capability and supporting conditions together. Flint supplies the wider framework of scale and agency. The difference between assets, readiness and realised outcomes is also central to Keohane and Nye's treatment of power. No numerical ranking of military strength is inferred from expenditure or equipment inventories. The five-hundred-kilometre movement is an illustrative distance, not the measurement of a named operation.

Maritime trade. UN Trade and Development's April 2025 seaborne-trade release states that more than 80 per cent of international trade in goods by volume is carried by sea. The denominator excludes services and is not the share of trade by value or the share carried in containers. The book does not combine this global ratio with the Hormuz oil-flow estimate.

Domestic authorisation. Carol Migdalovitz's Congressional Research Service report RL31794 records the Turkish parliament's failure on 1 March 2003 to authorise the proposed US troop deployment. Later arrangements for airspace and other cooperation were separate. The case establishes that this deployment lacked required authorisation; it does not establish a universal behaviour of democracies or NATO allies. Putnam's two-level-games analysis supports the more general distinction between an international bargain and the domestic process required to approve it.

Security dilemma and coercion. Jervis explains the conditional interaction between insecurity, offensive and defensive capabilities, and opportunities for cooperation. Schelling supplies the distinction between deterrence and compellence and the importance of communicating both a threat and the terms of compliance. Neither account implies that all aggression results from reciprocal misunderstanding. Wan's 2026 SIPRI study supports the discussion of escalation across conventional, nuclear and other domains. These mechanisms do not predict a crisis outcome without case-specific assumptions.

Alliances and law. The North Atlantic Treaty, especially Articles 5 and 6, and NATO's official Article 5 explanation establish the assistance obligation, national choice of necessary action and geographical scope. The treaty's obligation is not an automatic requirement for identical armed responses. The UN Charter supplies the rules on force, self-defence and collective security; Security Council voting is governed by Article 27. The European Union's conferred competences are stated in Article 5 of the Treaty on European Union. Arguments about credibility and implementation are analytical distinctions, not amendments to these legal texts.

Sensitivity, vulnerability and network power. The two gas-importing countries are explicitly imaginary. The EIA's explanation of liquefied natural gas establishes the need for receiving terminals and conversion back to gas; the contrast is an illustration of alternatives, not a measured comparison between countries. Keohane and Nye distinguish costs within an existing policy framework from the availability and cost of effective adjustment. Vulnerability therefore cannot be reduced to whatever happens after a fixed interval. Farrell and Newman explain how central networks can support information gathering or exclusion when states possess the necessary jurisdiction and institutions. Network centrality is not automatically available to any government wishing to exploit it. The semiconductor account uses the OECD's 2025 mapping of the value chain, with no single percentage offered as a measure of Taiwan's share of every type of chip production.

Adaptation and infrastructure. The EIA's June 2024 account and the Panama Canal Authority's April 2024 statement establish drought-related transit and draught restrictions. These were operational constraints, not permanent closure. The ITU's July 2026 cable-resilience material supports the distinction between rapid data transmission and slower physical repair, including uneven exposure where connections are few. The IEA's 2026 minerals outlook distinguishes mining, processing and manufacturing concentration. Geological deposits, annual output and refining capacity are not interchangeable measures. No causal estimate for climate change's contribution to the particular Panama drought is made.

How It Actually Works

Suez, Berlin and Cuba. The US Office of the Historian's accounts support the selected chronology and the public-private distinction in diplomatic settlements. Suez nationalisation occurred in July 1956 and the invasion began in October. British and French forces withdrew in December 1956; Israel completed its withdrawal in March 1957. The Australian Department of Veterans' Affairs' account distinguishes these dates. The US State Department's memorandum of 26 November 1956 describes Britain's reserves, confidence in sterling and dependence on financial cooperation. Boughton's IMF study examines the currency crisis and the British government's decision to defend sterling's existing exchange rate. Its account distinguishes agreement to a ceasefire from the withdrawal Washington required before supporting financial assistance. The military and financial pressures interacted; no single lever is treated as the whole explanation. The Berlin blockade ended in May 1949, while the airlift continued afterwards. The Cuban settlement in 1962 included a publicly announced Soviet withdrawal and US non-invasion assurance, alongside privately communicated removal of US Jupiter missiles from Turkey. The latter were removed in 1963. None of these episodes is reconstructed as an invented eyewitness scene.

Classical and critical geopolitics. Mahan's 1890 work, Mackinder's 1904 paper and Spykman's 1944 book are treated as historical arguments, not timeless laws. Mackinder's discussion of railways, his map of the pivot area, and his concluding qualification about organisation and equipment can be read together on the printed pages 434-437. That qualification coexists with sweeping geographical and racial assumptions. Ó Tuathail provides the critical account of strategic language and its political authority. The familiar later heartland formula is not quoted as a sentence from the 1904 paper.

Cold War, decolonisation and oil. Westad supplies the wider account of superpower intervention and local political projects. The Non-Aligned Movement's 1961 foundation does not imply uniform distance from both blocs. The 1973 oil episode follows the Office of the Historian's account of

Arab producers' embargo and production cuts. The IEA's institutional history dates its creation to 1974 in response to the crisis. The text does not equate all OPEC members with the Arab embargo coalition. China's WTO membership dates from 11 December 2001, as recorded by the WTO.

Ukraine and European security. UN General Assembly resolution ES-11/1, adopted on 2 March 2022, condemns Russian aggression and demands withdrawal. It is not presented as a judicial finding about every event in the war. NATO's official country records give Finland's accession as 4 April 2023 and Sweden's as 7 March 2024. Competing explanations of Russian decisions are distinguished from these documented actions and Ukraine's independent political agency. The book makes no claim about a current front line, an eventual settlement or the measurable contribution of each proposed motive.

Taiwan and regional cooperation. The Taiwan Relations Act, particularly 22 USC 3301 and 3302, states US policy on defensive arms, resistance to coercion and constitutional decision-making. It does not create an automatic mutual-defence obligation equivalent to a treaty guarantee of war. The PRC's August 2022 white paper states its territorial claim and refusal to renounce force; it is evidence of Beijing's position, not an adjudication of sovereignty. The Quad foreign ministers' statement of 26 May 2026 documents the four participants and areas of cooperation. Illustrative invasion and blockade possibilities are conditional scenarios, not forecasts or operational recommendations.

Maritime rights and the 2016 award. The UN Convention on the Law of the Sea, especially Part V, distinguishes the exclusive economic zone's resource rights and jurisdiction from territorial sovereignty. Its maximum breadth is 200 nautical miles from the relevant baselines; overlapping entitlements can require delimitation. The South China Sea tribunal was constituted under Annex VII, with the Permanent Court of Arbitration acting as registry. Its award addressed maritime entitlements and specified conduct, not island sovereignty or a maritime boundary. Finality and binding effect follow Article 296 and Annex VII, Article 11. The PCA's contemporary

press release, reproduced by the Peace Palace Library, and China's statement rejecting the award establish the distinction between legal findings and acceptance. No inference is made that the entire sea was awarded to the Philippines.

Hormuz oil measurement. The EIA's Global Energy Security Data release of 12 August 2026 reports quarterly average Hormuz oil flows for 2025 of 20.9, 21.0, 21.3 and 21.6 million barrels per day. The narrative rounds the full-year scale to roughly twenty-one million. It includes crude oil, condensate and petroleum products; LNG is reported separately in different units. This is a completed-year baseline, not a current 2026 flow estimate. The source's publication date, observation year and subsequent revisions remain distinct. Tracking-based estimates can be affected by missing or manipulated signals and inferred routes.

Israel and the Palestinians. The ICJ's advisory opinion of 19 July 2024 addresses the legal consequences of Israeli policies and practices in the Occupied Palestinian Territory, including East Jerusalem. Its discussion of self-determination and the unlawfulness of continued presence appears particularly in paragraphs 230-243 and 261-264, with conclusions in paragraph 285. The opinion was consulted in its full reproduction in *International Legal Materials*. It is distinct from the separate genocide proceedings and is not described here as a binding contentious judgment or an enforcement order. The ICRC's customary-law account of civilian protection supports keeping people's rights separate from the strategic advantage of a belligerent.

The Nile. Wheeler and colleagues model operations involving the Grand Ethiopian Renaissance Dam and downstream reservoirs under specified hydrological and policy assumptions. Their results illuminate timing, drought and refilling risks. They do not demonstrate that a proposed agreement was implemented, supply one result for every drought, or establish a universal effect of hydropower dams. The book retains the difference between water passing through turbines and decisions about storing or releasing it.

What People Get Wrong

Blockage and leverage. Boskalis's statement of 29 March 2021 documents the freeing of the *Ever Given*, grounded since 23 March. It supports the dated blockage and salvage example, not a claim about the incident's total financial cost.

Hambantota. Jones and Hameiri's original research distinguishes the 2017 lease transaction from a debt-for-asset seizure. The original debt was not cancelled in exchange for the lease. This finding concerns that transaction, not every Chinese-financed project, all subsequent uses of the port or the absence of strategic interests. Commercial rights, sovereign authority and military permissions must be examined separately.

Nuclear risk. SIPRI's 8 June 2026 yearbook assessment reports increasing reliance on nuclear weapons and rising risks of miscalculation and escalation. It supports the contemporary risk statement, not a probability of nuclear war. The absence of wartime nuclear use since 1945 does not independently identify deterrence as the sole cause. No arsenal total is needed for that distinction.

Use It, Terms and Go Deeper

The practical lenses are reasoned applications of the preceding model, not validated forecasting rules. The neighbouring governments building a frontier road, the two gas importers, the two-supplier manufacturer and the contrast between cargo-owner insurance and crew exposure are explicitly hypothetical or illustrative. Terms follow the legal and analytical distinctions identified above. The four further reads have distinct jobs: orientation, original argument, systematic study and critical interpretation. Flint's fourth edition carries a 2022 copyright date although publisher release metadata also records 2021. No page number has been inferred from a different edition.

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