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The Great Game in West Asia: A Realist Perspective on the Geopolitical Struggle for Control

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ABSTRACT

This paper examines the "New Great Game" in the West and Central Asian arc that stretches from the Mediterranean to the Caspian Sea, using structural realism as its analytical lens. It argues that rivalry among the United States, Russia, China, Iran, Turkey, Pakistan and the Gulf states is driven by competition over energy reserves, transit corridors and strategic position, and that this competition operates along three connected dimensions: geo-economic, geo-strategic and geopolitical. The paper traces the contest from its nineteenth-century Anglo-Russian origins to the post-9/11 period, maps the principal actors and their interests, and supports the argument with data on hydrocarbon reserves and on oil transit through the Strait of Hormuz. It then analyses the Syrian and Yemeni wars and the 2026 Gulf war as expressions of the same logic of power politics. The paper concludes that great-power competition erodes regional stability and constrains diplomacy, while local regimes exploit the rivalry for their own ends.

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1. Introduction

The region of land and sea traffic between the Mediterranean and the Caspian Sea has been one of the most disputed in global politics for two hundred years. The term "Great Game" originally referred to the struggle between the British and Russian empires for dominance in Central Asia in the nineteenth century, which was waged by exploration, diplomacy, subversion and on occasion war. It is the same geography where today's great and medium powers including the United States, Russia, China, Iran, Turkey, Afghanistan and Pakistan are vying to secure and expand their economic, security and political interests (Fatima & Zafar, 2020). The numbers don't lie: Today, a significant proportion of the world's proven oil and gas reserves is found under this area, and the Strait of Hormuz, which is located in the southern part of the country, is a seaway that has traditionally carried approximately 20% of all petroleum liquids consumption in the world. (U.S. Energy Information Administration EIA, 2024) There are a number of differences between the contemporary and classical game. It has become a multi-player game with regional states as players instead of pawns. In his review of Cooley's research on the region, Chapman (2013) emphasizes that the big powers are both cooperating and competing with each other; the United States is constrained by a choice between democracy promotion and security; and local regimes are setting the terms on which foreigners are present in their country by engaging in multi-vector foreign policies and recruiting external actors to play off against each other. The drivers have also changed. The War on Terror, global energy security search and the strategic interest of every participant have changed the nature of the competition and its impact extends beyond the region (Fatima & Zafar, 2020; Pradhan, 2022). The latest example is the ongoing war between the U.S., Israel and Iran, which started on 28 February 2026, and the resulting shipping disruptions in the Hormuz strait—an Iranian attempt to assert control over the strait, according to the U.S. Congressional Research Service (2026).

There's a need for a note on scope. The boundaries for "West Asia", "the Middle East" and "Central Asia" are overlapping and quite fluid, and the literature on "the New Great Game" often focuses on Central Asia, whereas the conflicts discussed here are in the Levant, Arabian Peninsula and the Gulf. This paper considers the arc that connects the Levant with the Persian Gulf and the Caspian basin and its Central Asian hinterland as a single strategic space because it is the same powers, resources and corridors that make it so. It uses secondary scholarship for interpretation and official and institutional statistics, primarily those of the U.S. Energy Information Administration, OPEC, BP and the United Nations, for empirical evidence. The argument consists of six steps. In section 2, a theoretical basis is presented, that is a structural realism approach and a geopolitical approach. Section 3 follows the history of the Great Game and outlines three aspects of the Great Game. Section 4 focuses on the main players and their interests. Section 5 focuses on what is at risk in terms of the resources, routes and infrastructure involved and looks at the empirical evidence related to the reserves and oil transit. The regional conflict, instability and diplomacy is examined in the cases of Syria, Yemen, and the 2026 Gulf war in Section 6. Section 7 outlines scenarios for the future and concludes.

2. Theoretical Framework: Structural Realism and Geopolitics

The study of international politics, and a natural starting point for the analysis of an area of rivalry, is realism. The classical view, linked to Morgenthau (1948), is that states behave in ways that serve their own power interests; and that political behavior is motivated and explained by the pursuit and defense of power. Its structural form proposed by Waltz (1979) moves the focus from human nature to the anarchic structure of the international system: if there is no authority above the state, each state must fend for itself to survive and the anarchic structure of the system which results from the distribution of capabilities among the states influences state behaviour more than domestic character does. Mearsheimer (2001) extends this further by claiming that great powers are uncertain about each other's intentions and will attempt to maximise their relative power and, if possible, regional hegemony. The two propositions combine to give clear expectations on the region studied: states will be fighting for resources and status; alliances will constitute instruments of interest and will change when the power balance changes; cooperation will be fragile when it will affect relative advantage.

In the context of the New Great Game this framework defines a security competition between the great powers, in which security interests, geopolitical position and energy reserves are the primary targets of competition (Fatima & Zafar, 2020). It also sheds light on the motives behind external actors intervening in weak or divided states: to block the rise of a rival influence, to guarantee access to resources, routes and to obstruct the development of an unfriendly regional order. A structural-realist perspective has great value in the

Syrian context as it sees Russia's policy as a quest for regional domination in a 'contested' Middle East (Didier 2017). The international community's response to the Syrian war has also been inadequate, as has also been the case in many conflicts, and this is linked to the general problem of the decline of hegemony, which is depicted by the ability of a hegemonic power to organise collective action (Pieper 1970). Realism also accounts for the frequent failure of diplomacy to resolve regional conflicts: if the opportunities for both sides are seen as zero-sum games, neither side nor their supporters have much reason to make any compromises. Realism's limits need to be recognized in a serious analysis. It assumes states as homogenous entities and largely ignores domestic politics, ideology, identity, and non-State actors all of which have a significant role in West Asia. Thus, this paper adopts a realist approach as one approach, rather than as a dominant one, and stresses the role of regional regimes as actors. In line with realist expectations that weaker states will balance and hedge between stronger ones, Chapman (2013) demonstrates that the governments of the Central Asian states are active agents that create local rules for foreign presence.

Geopolitics brings in the spatial dimension that realism does not have. It is now used in combination with socio-economic instruments and tools in geographical analysis to develop strategies for improving national power and control over space (Vlados et al., 2019). It takes into account all the forms of power – military, economic, cultural and environmental – at once and examines the relationship between them and location, distance, terrain and control of routes. Political outcomes are not determined by geography, but rather by the policy and strategy that is constrained by it and which it provides opportunities for (Rogers, 2011). Its intellectual roots go back to Mackinder (1904), who declared that the interior of Eurasia was a 'geographical fact' that was 'strategically more important' than control of the coast, and to Brzezinski's (1997) account of Eurasia as a 'grand chessboard' on which America would play a decisive part. It sits at the crossroads of these arguments: a region between the Mediterranean and the Caspian Sea, connecting Europe, Russia, South Asia and the Gulf, and host to energy resources that all big economies want to have. Another geopolitical factor is proximity to the central area of a great power. It is important to recognize, however, that the nature of great power games is also determined by their location and how far the contested region is from where the great powers would be based, and that when these great powers are far from the contested region, the cost of subordination can be less than the cost of war, leading to a game of chicken in which each side threatens to escalate without wishing for a decisive confrontation. (Vuving 2020) The insight applies to the United States and Russia and China, which have chosen to compete indirectly — via partners, sanctions, pipelines and investment — rather than directly in the Caspian basin and the Gulf. Structural realism and geopolitics are two lenses that can be combined to explain the importance of the region, who plays there, and how.

3. Historical Context and the Three Dimensions of the Great Game

The origins of the current competition date back to the nineteenth century when Britain and Russia competed against each other. At the same time the Russian Empire was pushing southwards through the Caucasus and into the steppe lands, while Britain was trying to secure control of the routes to India, both powers vied for control of Persia, Afghanistan and the khanates of Central Asia, and the story of this competition is told in great detail by Hopkirk (1990). The reasons for the contest remained much the same as they do today: protection of strategic location, control of trade routes and markets, and denial of gain to an opponent. It laid the groundwork for the idea of a heartland in Eurasia as a prize whose acquisition has repercussions for the balance of power; it also set a precedent as rulers of the area were courted, coerced, or replaced on the basis of the interests of outside powers (Fatima & Zafar, 2020). As from the beginning, economic and political competition was mated. As Karkazis et al. (2019) demonstrate, the Baghdad Railway plan, which dates back to the decades leading up to the First World War and was intended to connect Europe and the Persian Gulf via Ottoman lands, was encircled by an emerging rivalry between 'politics' and 'economy' in the Middle East. It was a commercial venture but it also posed a threat to the strategic geography of the region because it would give one power direct overland access to the Gulf and rival powers would react to that. The episode speaks to a theme that often crops up in today's game: infrastructure is never neutral and where a pipeline, railway or port is constructed, is a matter of who will have leverage over who.

In the twentieth century, when oil was discovered and the business of oil extraction began, the stakes changed. Control of the reserves was tied up with important armed conflicts and for decades long-term control of the Persian Gulf rested in the hands of the Western oil companies: this made it the centre of international security (D. Chapman, 2003). Position and resources make Iran a recurring target of foreign intervention,

whether in the nineteenth century by the British and Russians or in the twentieth by the Soviets or by the Americans in the 1953 coup, each of which had an impact on its internal politics and its enduring suspicion of foreign powers (Fatima & Zafar, 2020). The Cold War was then superposed on the region, and the Soviet Union's exit from Afghanistan and the subsequent collapse of the Soviet state brought a new group of external actors to the region. The current struggle, in their view, can be divided into two stages, as described by Fatima and Zafar (2020) under the name of "New Great Game". The first was during the Afghan civil war and the U.S. search for Osama bin Laden, a time when America had little presence in a region it had become an important player. The second phase began after the outbreak of the War on Terror, which put Central Asia at the epicentre of the international political chessboard and attracted Russian, Chinese, Iranian, Pakistani, Turkish and US interests to pursue their own political agendas and to acquire energy stocks and reserves through historical, cultural and geopolitical connections. Since then, India has become a player in the competition, wanting access to Central Asian resources and markets (George et al., 2022; Jan, n.d.), and China has increased its investment and diplomatic activity in the region (Fatima & Ahmad, 2021). Central Asia has also become an area of interest for the Gulf countries in terms of investment and diplomacy (Sahakyan, 2021).

Fatima and Zafar (2020) discern three dimensions to this contest and use them as an organising device for this paper. The geo-economic aspect is related to the search for control of the reserves of energy to the area and its use and development for economic purposes. The geo-strategic aspect has to do with the policies used by external powers to gain and consolidate control over those resources and to secure future supply, which include security partnerships, military presence and alliances. The geopolitical aspect relates to the geopolitical strategies of regional states, which are in search of a role in the world and must play off the other powers while leveraging their role and resources. The three dimensions support each other. The economic incentive is energy control, the instruments are supplied by strategic policy and the extent of the outside powers' penetration is dictated by the diplomacy of the regional states. The division is useful in revealing that the same event, like the signing of a security agreement or the building of a pipeline, may be interpreted at the same time as an economic contract, a strategic decision, and a diplomatic gesture in the region.

4. Key Actors and Their Strategic Interests

There are basically three kinds of players in the New Great Game: extra-regional powers that try to exert their influence in the region, regional powers whose security is dependent on the result of the game, and the smaller powers who host the event for their own gain. They share an interest in energy and security, but on how to achieve these interests, they clash, collaborating and competing in this area. The USA is the most significant extra-regional player. It gained further involvement in the wake of the Afghan civil war and the War on Terror, providing military access and strengthening ties with the region, and bringing counter-terrorism to the forefront of its strategy (Fatima & Zafar, 2020). Washington has long been concerned with the security of energy supplies from the Gulf and it has often been forced to make choices between fostering democracy and gaining the cooperation of authoritarian governments whose territory and energy resources it requires (Chapman, 2013). Its clash with Iran leading to the war that started in February 2026 is no exception (Congressional Research Service, 2026). Russia considers the area to be in its sphere of interest and sees it as a source of its levers in energy markets. It intervenes in Syria, seen by Didier (2017) as a quest for regional hegemony in a contested Middle East with repercussions for the Euro-Atlantic community, and as the owner of the world's largest proven natural as reserves it has an interest in all pipelines and export routes (IENE, 2018). As a recurring theme in the current game, Russia and China work together and against one another in Central Asia (Chapman 2013). China is the new main rival of the other great powers. It is interested in the region mostly because of its quest for energy resources for its economy and building trade and infrastructure connections with Eurasia (Fatima & Ahmad, 2021). It is important to note that the EIA (2024) estimates that in 2023, the Strait of Hormuz was used by approximately 69 per cent of China's, India's, Japan's and South Korea's total crude oil and condensate movement, suggesting that the security of Asian economies is directly linked to the security of the Gulf. Beijing's ties with Tehran are grounded in their mutual opposition to Western pressure and in energy commerce, but Tehran's importance for Beijing is also on energy supply, meaning they are not far from compromising on U.S. efforts against Tehran. On the other hand, India has been seeking energy and market access in Central Asia, among other things, in a further attempt to ensure energy security and strategic depth (George et al., 2022; Jan, n.d.). Iran is in the middle due to its geographic and resource locations. It is located along the corridor connecting the Caspian sea to the Persian Gulf and the Indian Ocean,

and it holds the world's second largest proven natural gas reserves with some of the world's largest proven oil reserves (IENE, 2018; WorldAtlas, 2024). It is located in a strategically important position and that is why it has been a target of foreign intervention for over 100 years from British and Russian designs to the 1953 coup and this has been a factor to worry about foreign powers (Fatima & Zafar, 2020). The Revolution in 1979 and the ensuing war with Iraq destroyed its influence in the Islamic world, and the relationship with the oil-rich monarchies has shifted from sponsorship to competition, causing containment of them to be a central problem of the leadership (Fatima & Zafar, 2020). Iran's capacity to threaten sea traffic in the Hormuz Strait is asymmetric: in 2026 it acted more powerful than its conventional armed forces.

This is not the case in Turkey. It is located at the crossroads of Europe and Asia, with the objective of maintaining its status as a bridge between the two continents and serving as a regional power, it is being of interest to US, Europe, Russia and the Central Asian republics (Fatima & Zafar, 2020). Control of the Turkish Straits, through which an estimated 3.4 million barrels of oil passed daily in 2023, and as a transit country for Caspian energy exports allow Ankara to hold strong leverage in negotiations over routes (EIA, 2024). Turkey also played a role in the Syrian conflict in favor of some of the opposition (Didier, 2017). Fatima and Zafar (2020) have named Pakistan and Afghanistan among the regional players in the competition, which see them as possible transit corridors to the Indian Ocean from the Central Asian energy producers. Pakistan has also served as a diplomatic intermediary, being the main facilitator in the negotiations between the United States and Iran regarding a memorandum of understanding in June 2026 (Britannica, 2026). The case of that role is typical in the realist literature, where middle powers gain influence through being sandwiched between more powerful actors.

From the Gulf monarchies, they are beneficiaries as well as participants. Saudi Arabia and the United Arab Emirates have the sole pipelines capable of avoiding Hormuz, and Saudi Arabia's East-West pipeline has a capacity of 5 million bpd, providing Riyadh with some insulation not found with other producers (EIA, 2024). The Gulf states also started to turn their gaze towards the East, perceiving Central Asia as a field for investment and diplomacy, as the global power balance of economic interests evolves (Sahakyan, 2021). Saudi Arabia was the chief leader of the military coalition in Yemen, and has been one of its primary competitors for regional influence against Iran (Sharp, 2017). Lastly, the Central Asian regimes are not passive or innocent observers, but are active actors. According to Chapman (2013), Cooley's argument is that the true beneficiaries of the competition are the local regimes that establish rules governing the presence of foreigners, manage competing patrons, and reap economic and political gains from the competition. This is the geopolitical aspect of the game in Fatima and Zafar's scheme and one of the paramount reasons why the outcome of the competition is not solely determined by the preferences of the biggest powers.

5. Energy, Routes and the Empirical Evidence

Energy is the principal object of the geo-economic dimension of the New Great Game. The quest to control the region's reserves, and to shape how they are produced, transported and sold, drives the strategies of Russia, China, Iran, Pakistan, Turkey and the United States alike (Fatima & Zafar, 2020; Pradhan, 2022). Oil and gas matter to these states for three reasons: they are essential to the functioning of industrial economies, they generate revenue that funds regimes and militaries, and their movement requires infrastructure that can be defended, denied or taxed. A state that holds reserves, or controls the routes by which they reach markets, holds leverage over those who depend on them. The security of the Persian Gulf illustrates the relationship between energy and power politics. Control and exploitation of Gulf reserves have been linked to major armed conflicts, and for much of the twentieth century the region's oil industry was shaped by Western oil companies, a reflection of the global importance attached to the resource (D. Chapman, 2003). The pattern has persisted in new forms. Reserves are concentrated in a small number of states, and the distribution of that concentration explains much of the region's strategic weight.

Figure 1 shows the scale of the concentration in oil. According to OPEC data compiled by WorldAtlas (2024), Saudi Arabia holds about 267 billion barrels of proven reserves, Iran about 209 billion, Iraq about 145 billion, the United Arab Emirates 113 billion and Kuwait about 102 billion. Together these five Persian Gulf states account for roughly 835 billion barrels, more than ten times the 80 billion barrels attributed to Russia. The figures should be read as indicative rather than exact, since reserve estimates depend on figures supplied

by national authorities and on definitions that vary between sources, and rankings differ across publications and years.

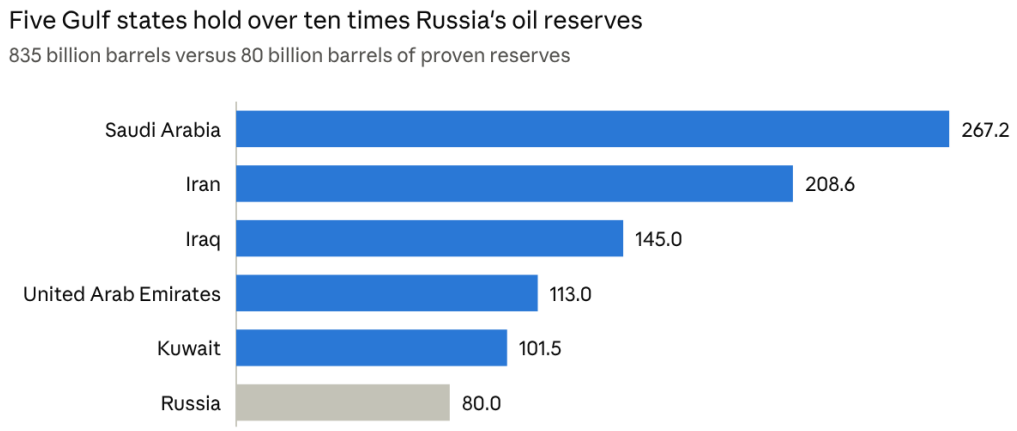


Figure 1. Proven oil reserves, billion barrels. OPEC data (2024 ranking) as compiled by WorldAtlas (2024).

Natural gas shows a different but equally concentrated distribution, in which Central Asia and Russia play a larger role. Figure 2 reproduces the BP Statistical Review figures for the end of 2017 as reported by IENE (2018). Russia held 35 trillion cubic metres, Iran 33.2 trillion and Qatar 24.9 trillion, and Turkmenistan, the largest Central Asian holder, 19.5 trillion. The three leaders alone held about 93 trillion cubic metres, nearly twice the combined holdings of the other six countries listed. The figure for Turkmenistan illustrates how unstable such estimates can be: BP raised its estimate of Turkmen reserves to 24.3 trillion cubic metres in 2012 and then cut it sharply to 17.5 trillion in the following edition (OGN News, 2013), and a later BP vintage lists 13.6 trillion for 2020, alongside 37.4 trillion for Russia, 32.1 trillion for Iran and 24.7 trillion for Qatar (Planète Énergies, n.d.). For a realist analysis the lesson is that uncertainty about reserves is itself a strategic variable, because estimates shape investment, pipeline planning and the bargaining power of producers.

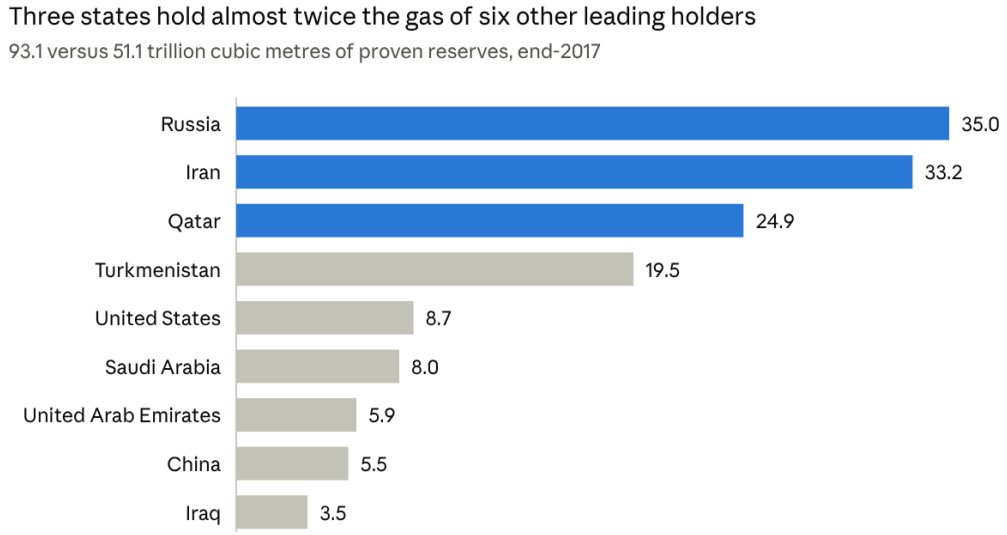


Figure 2. Proven natural gas reserves, trillion cubic metres, end-2017. BP Statistical Review of World Energy 2018, as reported by IENE (2018). Shows the countries listed by the source, not every holder.

Reserves are only valuable if they can reach markets, and so routes and infrastructure are central to the contest. Historic corridors such as the Silk Road and modern pipelines serve as channels for goods and resources and as instruments of geopolitical influence and future supply security (Fatima & Zafar, 2020). Pipeline politics has accordingly become a defining feature of the New Great Game (Pradhan, 2022). In the Caspian basin, whose five surrounding geological basins hold substantial hydrocarbon potential, the coastal states have struggled to agree a comprehensive legal regime because each seeks the best share for itself, and this dispute has shaped regional diplomacy and attracted the attention of outside powers (Mottaghi, 2016). The

only alternative to the Turkish Straits for Caspian crude is the Baku-Tbilisi-Ceyhan pipeline to the Turkish port of Ceyhan, which gives Ankara a central role in the geography of Eurasian energy (EIA, 2024). Great powers also respond to chokepoint vulnerability by building alternatives. China has invested in pipelines from Myanmar to Yunnan, with a crude oil capacity of 440,000 barrels a day, and in the Eastern Siberia-Pacific Ocean and Power of Siberia lines from Russia, in order to reduce its exposure to the Strait of Malacca (EIA, 2024). This behaviour is exactly what realism predicts of a rising power concerned about dependence on routes that rivals could close. No chokepoint is more significant for the region than the Strait of Hormuz. In 2023 oil flows through the strait averaged 20.9 million barrels a day, equivalent to about 20 per cent of global petroleum liquids consumption and more than a quarter of seaborne oil trade, and about one-fifth of global liquefied natural gas trade also passed through it (EIA, 2024). An estimated 83 per cent of the crude oil and condensate moving through Hormuz in 2023 went to Asian markets, with China, India, Japan and South Korea accounting for 69 per cent (EIA, 2024). Few alternatives exist. Only Saudi Arabia and the United Arab Emirates operate crude oil pipelines that can bypass the strait, namely Saudi Aramco's 5 million barrel-a-day East-West pipeline and the Emirati 1.5 million barrel-a-day line to Fujairah, and the EIA estimated that only about 2.6 million barrels a day of effective unused capacity would be available in a disruption (EIA, 2024). Iran's own bypass, the Goreh-Jask pipeline, had a capacity of 0.3 million barrels a day and had not been used since 2021 (EIA, 2024). In other words, the region's most important energy artery had almost no substitute, and the state that sits on its northern shore possessed the means to threaten it.

The 2026 war turned that vulnerability into reality. After the United States and Israel launched attacks on Iran on 28 February 2026, Iran sought to exert control over the strait, which comprises both Iranian and Omani territorial waters (Congressional Research Service, 2026). The EIA estimated that crude oil and petroleum liquids transiting Hormuz averaged 4.9 million barrels a day in the second quarter of 2026, down from 21.6 million in the fourth quarter of 2025, before the conflict began, which is a fall of about 77 per cent (Exarheas, 2026). Figure 3 places this collapse against the 2018 to 2023 record, in which annual flows ranged only between 18.4 and 21.4 million barrels a day, with the lowest level in the pandemic year of 2020 (EIA, 2024). Flows through Bab el-Mandeb rose from 5.4 to 8.1 million barrels a day over the same period as Saudi Arabia rerouted crude through the East-West pipeline to Yanbu on the Red Sea, a shift that exposed Saudi exports to a new blockade threat at Bab el-Mandeb (Exarheas, 2026). The EIA assessed that crude production shut-ins averaged 5.5 million barrels a day in July 2026 and that Brent crude, which touched $69 a barrel on 2 July after the June memorandum between Washington and Tehran, reached as high as $105 on 23 July after renewed attacks on tankers, and it did not expect production and trade patterns to normalise until early 2027 (Exarheas, 2026).

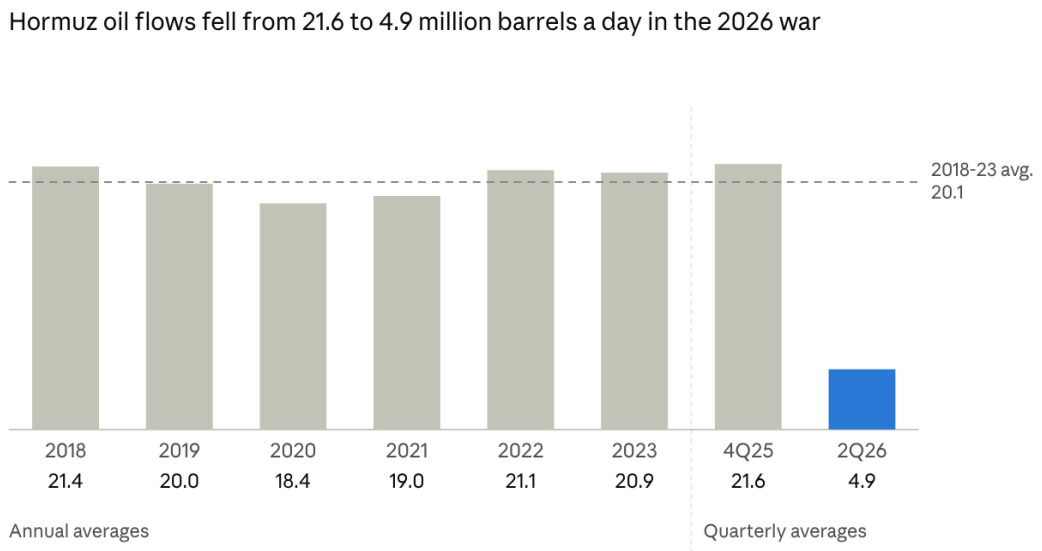


Figure 3. Crude oil and petroleum liquids through the Strait of Hormuz, million barrels per day. EIA (2024) for 2018-2023; EIA Short-Term Energy Outlook, August 2026, as reported by Exarheas (2026), for 4Q25 and 2Q26.

The evidence supports three conclusions. First, the geography of reserves and routes concentrates leverage in a small number of states and straits, so that a regional power with relatively modest conventional capabilities can influence the economic security of great powers far away. Second, bypass infrastructure and diversification are the typical responses of exposed states, and their limited capacity explains why the Gulf remains so strategically sensitive. Third, the chokepoints of the region are linked: the Houthi attacks on shipping around Bab el-Mandeb, which began in mid-November 2023, had already diverted oil and gas vessels around the Cape of Good Hope and raised insurance costs (EIA, 2024), and the 2026 crisis shows that closure of one passage immediately raises the strategic importance of another.

6. Regional Conflicts, Stability and Diplomacy

From a realist standpoint, proxy wars and regional conflicts are the clearest expression of great-power rivalry, because they allow external actors to pursue strategic aims through local parties without direct confrontation with one another. Three conflicts illustrate the pattern: the Syrian war that began in 2011, the Yemeni war that escalated in 2014 and 2015, and the war involving Iran, the United States and Israel that began in February 2026. Each started with a local or bilateral grievance, each drew in external patrons with competing interests, and each altered the regional balance of power and the security of energy flows.

The Syrian crisis began in 2011 as part of the wider wave of protest in the Arab world and escalated into armed conflict when the government met demonstrations with force and opposition groups took up arms (Didier, 2017). External powers soon aligned on opposing sides. Turkey, Saudi Arabia, Qatar and Western governments backed elements of the opposition, while Russia and Iran stood by the government, so that the country became a venue in which the competing interests of outside powers were worked out through Syrian actors (Didier, 2017; Pieper, 1970). Diplomacy exposed the underlying incompatibility of interests. At the Geneva II talks the opposition rejected any role for President Assad in a transition, while the government sought to exclude armed opposition groups, focused on defining who counted as a terrorist and treated elections as the only legitimate way to change the composition of government (Pieper, 1970). Didier (2017) reads Russia's intervention as a bid for regional hegemony with consequences for the approach of every other outside actor, and Pieper (1970) argues that the incapacity of the international community to respond effectively was itself evidence of hegemonic decline. The human consequences were immense. By December 2012, less than two years after the uprising began, UNHCR counted 509,559 Syrians registered or awaiting registration as refugees in neighbouring countries and North Africa (UN News, 2012). The agency's current portal reports about 3.8 million registered Syrian refugees in the region, made up of 2.20 million registered by the Government of Türkiye, 1.57 million registered by UNHCR in Egypt, Iraq, Jordan and Lebanon, and more than 31,000 in North Africa, compared with about 5.7 million in an earlier portal snapshot (UNHCR, 2026; UNHCR, 2024). The situation in Syria has continued to evolve, and the case is used here chiefly to illustrate the mechanics of proxy competition.

Yemen followed a comparable path from domestic upheaval to regional war. Saleh left power in 2012 after the uprising, and his former deputy Abd Rabbu Mansour Hadi became president; the Houthis, a Zaidi Shia movement from the north, then exploited the weakness of the transitional government and seized the capital, forcing Hadi to flee to Saudi Arabia (Sharp, 2017). In March 2015 Saudi Arabia assembled a coalition and launched a military operation to restore Hadi's government and push back the Houthis (Sharp, 2017). The expected quick victory did not materialise. The Houthi alliance with Saleh unravelled in December 2017, and the Houthis killed the former president on 4 December (Sharp, 2017). The war settled into a costly stalemate in which the Houthis retained control of Sana'a and much of the north. For realists the case demonstrates how a local civil conflict can be absorbed into a wider balance-of-power struggle between Saudi Arabia and Iran, in which each patron fears that withdrawal would hand its rival a strategic gain. The conflict has also acquired an energy dimension. Houthi attacks on shipping around Bab el-Mandeb beginning in November 2023 diverted oil and gas cargoes around the Cape of Good Hope (EIA, 2024), and in 2026 the EIA cited a new blockade threat against Saudi oil exports through the same strait (Exarheas, 2026). The humanitarian cost is among the highest in the world. The United Nations estimates that 22.3 million people in Yemen require humanitarian assistance and protection in 2026, including 5.2 million internally displaced people, and that 18.3 million face acute food insecurity, while nearly 40 per cent of health facilities are partially or not functioning (United Nations Office for the Coordination of Humanitarian Affairs [OCHA], 2026).

The war that began on 28 February 2026 is the most direct test of the arguments of this paper. According to the U.S. Congressional Research Service (2026), Iran responded to the American and Israeli attacks by seeking to exert control over the Strait of Hormuz. The United States and Iran agreed a ceasefire in April 2026 and signed a memorandum of understanding in June, but the conflict resumed in July when Iranian forces attacked commercial shipping that did not comply with Iranian demands, and by early August the United States had reimposed its naval blockade (Congressional Research Service, 2026). The dispute turned on interpretation. The memorandum, announced in mid-June by Pakistan's prime minister, who acted as a key mediator, was read by Washington as requiring Iran to guarantee safe passage through the strait, while Tehran treated its wording as recognition of a role in controlling traffic and charging fees (Britannica, 2026). A realist would not be surprised. The agreement left unresolved the central question of who has the power to govern the passage, and both sides had strong incentives to interpret ambiguity in their own favour. The episode also confirms the geo-strategic logic set out in Section 3: whoever can threaten the chokepoint can convert a regional conflict into a global economic problem, and outside powers will act to prevent that conversion.

These conflicts have affected regional stability in several ways. The rivalry among Russia, China, Iran, Pakistan, Turkey and the United States creates a dense web of alliances, rivalries and manoeuvres that can destabilise the region (Fatima & Zafar, 2020). Competition for energy, for security advantage and for the loyalty of regional states each adds pressure, and the scholarly literature traces the causes and consequences of the Great Game for the stability and human welfare of Central Asia in particular (Bhat, 2020, 2023). The beneficiaries of instability are not always the great powers. Regimes that set the rules for foreign presence extract economic and political benefits from rivalry and may have limited incentive to resolve disputes that bring them attention and resources (Chapman, 2013).

The connection between the Great Game and terrorism is complex and should be treated with caution. The Afghan civil war and the US-led War on Terror marked the turning point that opened the second phase of the contest and brought Central Asia to the centre of great-power attention (Fatima & Zafar, 2020). External intervention in weak states, through the arming of factions, the militarisation of local disputes and the periodic collapse of central authority, can deepen the grievances on which extremist groups draw and create the ungoverned spaces in which they operate. This paper treats that link as a plausible consequence of great-power competition rather than as an established causal law, since the origins of extremism also lie in domestic politics, ideology and identity.

Diplomacy has repeatedly struggled to contain these dynamics. The United Nations has mediated in the region, but the effectiveness of mediation varies with the complexity of the situation and the willingness of the parties to negotiate, and it is constrained by the entrenched interests of major powers and by the historical and cultural complexity of the region (Fatima & Zafar, 2020). The Syrian talks illustrate how incompatible positions on a transitional authority can block progress for years (Pieper, 1970), and the 2026 memorandum shows that even a signed agreement can fail when its central term is open to competing readings (Britannica, 2026). The competition over oil and gas, including pipeline politics, further complicates the diplomatic landscape (Pradhan, 2022). It would be wrong, however, to conclude that diplomacy is futile. Pakistan's mediating role in 2026 and the repeated attempts to restore a ceasefire demonstrate that intermediaries with access to both sides can obtain interim agreements, even if they have rarely produced durable settlements (Britannica, 2026).

7. Future Scenarios and Conclusion

Based on the evidence and arguments presented above, several scenarios exist which cannot be confidently predicted as to their future. In the first, the competition increases. Energy resources and strategic locations are continually targeted by the big powers in the geo-economic, geo-strategic and geopolitical aspects, while regional conflicts continue to be patronised by external powers and chokepoints are used repeatedly as leverage or for bargaining (Fatima & Zafar, 2020). The speed at which such an escalation can happen is illustrated in the events of 2026: Within weeks of a ceasefire and a memorandum of understanding, attacks on shipping resumed and the blockade was reinstated (Congessional Research Service (2026)). However, even with the EIA's central scenario of moderate recovery of Hormuz flows, production and trade would not have reached pre-conflict levels until early 2027, and some of the Gulf's producers could not have returned to earlier levels of production during the forecast period (Exarheas, 2026). A prolonged disruption

would further drive the incentive for Asian importers to diversify routes while adding bypass capacity to the Gulf exporters, as China did in the case of Malacca (EIA, 2024).

In the second situation, the contest becomes a managed standoff which Vuving (2020) labels a game of chicken. The region is too remote from the great powers sphere of influence to make the costs of subordination seem as high as the cost of war, and both sides prefer to employ sanctions, blockades, proxies and pressure against commercial routes to direct confrontation. It happens in Syria, Yemen and the Gulf, where the powers have frequently raised their actions, then backed off, and have drawn up agreements so vaguely that each side can claim to be adhering. Its chief risk is that each side has to interpret the signals of the other; the dispute over the wording of the June memorandum demonstrates that this can be a tricky business (Britannica, 2026).

In the third case, the states in the region are allowed to have more autonomy. Middle powers like Pakistan, which acquired a more prominent position in diplomacy during 2026 due to its mediation role, can gain influence by standing between stronger powers (Britannica, 2026), while central powers can improve their economic position and their global standing by exploiting the rivalry between outside powers (Chapman, 2013; Sahakyan, 2021). This is a situation in which the region is not a stable order, but one that is trending towards a more decentralized, multipolar balancing arrangement of energy in which more actors have the opportunity to shape energy flows through more routes. This would strengthen the case for the realists who see the pattern of rivalry as a function of the structure of the system, instead of the preferences of the individual leaders.

Three consequences for policy makers are drawn from the experience. First, the control of energy corridors and the legal framework applied to them is crucial to stability, as the Caspian dispute (Mottaghi, 2016) and the Hormuz crisis have shown. Secondly, the willingness of each power to absorb costs depends on geography, with interventions in the periphery of a great power being likely to be limited and indirect (Rogers, 2011; Vuving, 2020). Third, local agency means that outsiders are not entitled to assume that their partners have the same interests as them and strategies that do not take this into account will likely be counterproductive (Chapman, 2013). A third dimension is humanitarian considerations: the level of displacement in Syria and need in Yemen suggests costs of competition are borne disproportionately by civilian populations, and the work of the diplomacy of the great powers is no replacement for sustained humanitarian response (OCHA, 2026; UNHCR, 2026).

The New Great Game in West and Central Asia has been explained as a realism struggle for power, resources and position, which is being fought along geo-economic, geo-strategic and geopolitical lines (Fatima & Zafar, 2020). History provides no reason to suggest that the rivalry between Britain and Russia in the nineteenth century and the competition between them today have been disconnected, as both sides have sought to use infrastructure, resources and local rulers as tools for their own external ambitions (Hopkirk, 1990; Karkazis et al., 2019). These figures illustrate the importance of the region, as it is one of the largest oil reserves holders with over 10 times Russia's oil reserves, and there are 3 of the 8 largest oil reserves holders, equaling nearly 2 times how much the 6 largest states have, while the region's petroleum liquids consumption through a single strait is about a fifth of the rest of the world's consumption during normal times (EIA, 2024; IENE, 2018; WorldAtlas, 2024). Examples of how external competition turns local grievances into regional war include the conflicts in Syria, Yemen and the Gulf and of the consequences of a contested chokepoint, the projected decline in Hormuz traffic from 21.6 million to 4.9 million barrels a day in 2026 (Exarheas, 2026).

The analysis has some restrictions. It is based on secondary scholarship and on institutional statistics, whose coverage and definition vary, as well as its geographical approach that brings together areas that the literature tends to separate. The evidence cited may be superseded due to the uncertainty of reserve estimates and their frequent updates, as well as the events in 2026, which are recent and ongoing. More detailed study of strategies of individual actors may be possible, such as the recent focus on India (George et al., 2022; Jan, n.d.) and China (Fatima & Ahmad, 2021), and further testing of the realist account against primary evidence such as energy contracts, basing agreements, and shipping data; and comparison of realist explanation with approaches which allow for greater importance of ideology, identity and domestic politics. This work would

help to shed light on an area which is still enjoyed by great powers and whose influence extends far beyond its borders.

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