



“In fact, the issue is always between two points”

Weekly
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Developments

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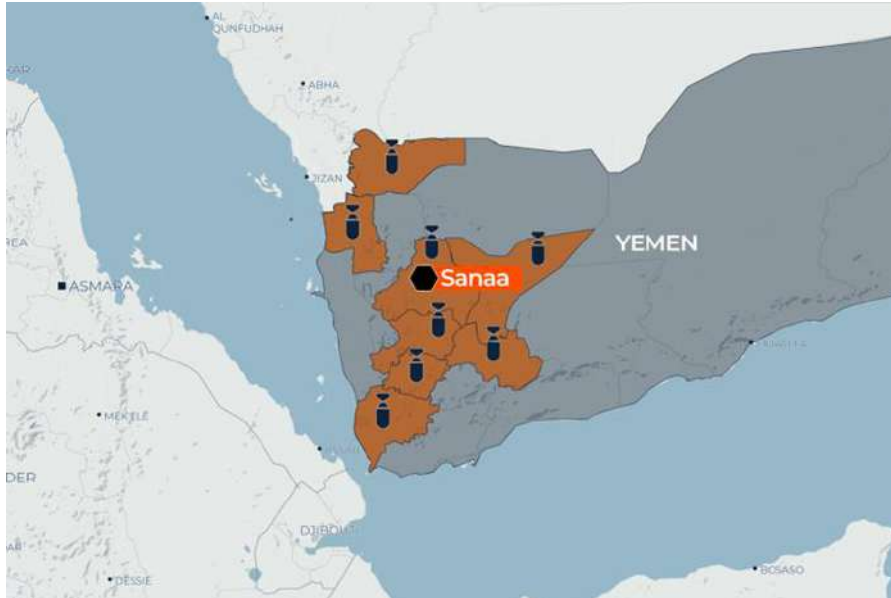
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U.S. ATTACK ON YEMEN:

THE YEMEN OPERATION AS PART OF A BROADER STRATEGY AGAINST IRAN

U.S. President Donald Trump announced on Truth Social on Saturday that he had ordered the U.S. military to take "decisive and strong" action against the Houthis in Yemen¹. And the attack took place.

So, why is the U.S. attacking Yemen a year later?



<https://www.aljazeera.com/news/2025/3/16/mapping-us-attacks-on-yemen>

1. Yemen is one of Iran's last remaining footholds in the region, and the U.S. wants to weaken its influence in favor of Israel.

For Iran, Yemen is not just a battleground for a proxy war; it has become a critical point for shaping regional power balances, threatening Saudi Arabia and Western trade routes, establishing an indirect attack mechanism against Israel and the U.S., and spreading Shiite ideology. Therefore, Iran continues to support the Houthis in Yemen to strengthen its regional influence.

2. Iran will be the next direct target, and reducing its influence in Iraq, Syria, and the Gulf is a primary objective.

Iran has been working to shift regional power dynamics by increasing its influence in Yemen, challenging Saudi Arabia, the UAE, and other Gulf states. With Iranian support, the Houthis use long-range ballistic missiles and drones to threaten Saudi oil facilities and critical infrastructure, enhancing Iran's deterrence power in the Gulf region.

3. Laying the groundwork for the next move regarding Iran's domestic politics and nuclear program.

Iran has faced economic crises, social unrest, and political pressures in recent years. By attacking the Houthis in Yemen, the U.S. and its allies are increasing pressure on Iran through proxy wars, forcing it to divert more economic resources toward military spending. This could further strain Iran's economy, which is already struggling under sanctions.

Moreover, deep divisions exist within Iran between conservative hardliners loyal to the regime and reformists. The U.S. attacks in Yemen strengthen the narrative that Iran's foreign policy is isolating the country, which could embolden opposition forces. If the Houthis suffer major setbacks, the perception of Iran's foreign policy failure could further erode public support for the regime².

Iran's nuclear program is viewed as a major threat by the West and Israel. The Yemen operations could pave the way for the U.S. and Israel to take more aggressive steps against Iran's nuclear ambitions and provide justification for direct intervention. The U.S. is striking Yemen under the "legitimate self-defense" narrative against Iran's proxy groups, which could later serve as a pretext for directly targeting Iran³.

¹ <https://www.newsweek.com/donald-trump-launches-decisive-military-action-yemen-houthis-2045462>

² Mass protests in Iran that began with the death of Mahsa Amini in 2022 weakened the regime's domestic support

³ Israel, in particular, has long wanted to strike Iran's nuclear facilities, but has been waiting for an event that would legitimize this in the global public opinion.

4. Weakening the southern arm of the "Shia Crescent" after the northern one.

Iran has long pursued a regional expansion strategy. Since the 2000s, it has increased its influence in Lebanon, Syria, Iraq, and Yemen, forming what is known as the "Shia Crescent"—a network of proxy forces extending from Tehran to the Mediterranean and the Red Sea.

- **Northern Arm:** Iran established its presence through Hashd al-Shaabi in Iraq, Iran-backed militias in Syria, and Hezbollah in Lebanon.
- **Southern Arm:** Through the Houthis, Iran created a counterbalance against Saudi Arabia and the UAE in the Gulf.

For years, the U.S. and its allies have conducted operations against Iran's northern corridor (Iraq, Syria, and Lebanon). The recent attacks on Yemen signal an attempt to weaken Iran's southern influence. Weakening the Houthis would:

- Reduce Iran's military foothold in Yemen.
- Ease pressure on Saudi Arabia.
- Undermine Iran's ability to threaten Israel and the West through its Houthi proxy in the Red Sea.
- Mark the beginning of Iran's loss of influence in the entire Gulf region.



<https://levant24.com/infographics/2022/03/the-iranian-shiite-crescent-on-the-rise-in-the-middle-east/>

5. Cutting off Hezbollah's southern logistics channel.

Since 2018, the U.S. has conducted numerous strikes against Iran-backed groups like Hashd al-Shaabi, Iranian militias in Syria, and Hezbollah. However, the northern axis has not been completely dismantled. If the Houthis in Yemen are struck hard, Iran's dual-expansion strategy could suffer a significant setback.

Iran uses a multi-layered logistics network to support its proxy forces, and Yemen is a key part of this system:

- **Northern Route:** Iran supplies Hezbollah through Iraq and Syria, protected by Hashd al-Shaabi and other Iran-backed militias.
- **Southern Route:** The Houthis facilitate indirect Iranian support for Hezbollah via the Red Sea and Gulf of Aden.

Iran has sought strategic control over the Red Sea through the Houthis. If the Houthis lose ground, Iran's ability to supply Hezbollah via maritime routes will diminish. Operations in the Red Sea and Bab al-Mandeb Strait will disrupt Iran's arms smuggling, weakening Hezbollah's long-range missile and drone capabilities.

6. Protecting international trade routes through the Red Sea (freight, insurance, and route costs).

The Red Sea, via the Suez Canal, is one of the world's most critical maritime trade routes, linking Europe, Asia, and Africa. The Bab al-Mandeb Strait is the narrowest and most strategic point in this corridor. Around 12% of global oil trade and a significant portion of container shipping pass through this strait. Alternative routes, such as sailing around Africa via the Cape of Good Hope, significantly increase costs and travel time. Continued Houthi threats to this corridor cause global trade disruptions⁴, leading to rising insurance costs, shipping fees,

⁴ In recent years, the Houthis have carried out attacks that pose a direct threat to Israeli interests on trade routes in the Red Sea:

- UAV and missile attacks on tankers and cargo ships.
- Threats against US and Western commercial and military ships carrying cargo to Israel.
- Sabotages targeting oil tankers heading to Saudi Arabia and the UAE.

and delays⁵. Trump's administration views the Yemen attack as part of a long-term strategy to secure and control the Red Sea, preventing Iran's proxy groups from disrupting global trade. Given the increasing competition with China, protecting these routes is a strategic necessity for the U.S.⁶

7. Strengthening Israel's position amid the ongoing Gaza operation and tightening the blockade.

Israel enforces a land, sea, and air blockade on Gaza. However:

- Iran-backed groups have found ways to smuggle weapons into Gaza.
- The Houthis play a crucial role in Iran's regional strategy, so weakening them would weaken Iran's Gaza-related plans.

U.S. strikes in Yemen aim to disrupt Iran-backed maritime supply chains in the Red Sea, helping Israel tighten its blockade on Gaza and increase pressure on resistance groups.

8. Dividing the Arab coalition that has been showing unity over Gaza.

U.S. attacks on Yemen could deepen existing tensions among Arab nations. Saudi Arabia and the UAE, facing Houthi threats, might support U.S. strikes. However, this move risks fragmenting the Arab world further, as some countries see the operations as serving Israel's interests. Egypt and Jordan, for example, may view them as part of Trump's broader Gaza strategy and could distance themselves from the U.S. This development targets the fragile unity within the Arab League, potentially weakening the region's collective stance against Israel.

9. A show of force against the Russia-Iran-China naval drill in the Gulf of Oman.⁷

According to Russia's Defense Ministry, Russian, Iranian, and Chinese warships conducted a naval drill, "Maritime Security Belt 2025," in the Gulf of Oman, involving live artillery fire and a ship rescue exercise. The U.S. attack on Yemen is likely a direct response to this exercise, signaling U.S. resolve against growing Russian, Iranian, and Chinese naval influence. The U.S. is reaffirming its control over global maritime trade routes, particularly in the Red Sea and Indian Ocean, and is committed to protecting its allies in the Gulf.

This escalation suggests an intensifying naval security struggle in the region.



<https://www.ispionline.it/en/publication/gulf-powers-maritime-rivalry-western-indian-ocean->

⁵ The security risk posed by the Houthis in the Red Sea has increased costs in global trade:

- Insurance Costs: War risk insurance rates for ships passing through the Red Sea have skyrocketed.
- Transportation Costs: Many companies have changed routes to avoid Houthi attacks, increasing transportation costs.
- Route Alternatives: Circling Africa via the Cape of Good Hope instead of the Red Sea is up to 30% more expensive and takes 10-15 days longer.

⁶ If the Houthis lose control of the Red Sea:

- Global shipping insurance costs could decrease.
- Oil and LNG transportation could become safer.
- The commercial importance of the Suez Canal could be preserved, and additional costs from rerouting could be avoided.

⁷ Russia was represented in the exercise by the Pacific Fleet's Rezkiy and Aldar Tsidenjapov corvettes and the medium-sized naval tanker Pechenga. For two days, the ship crews fired at targets simulating unmanned boats and enemy drones, using large-caliber machine guns and small arms, both day and night.