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

Weekly
Political and Geopolitical
Developments

June 23, 2025

TEMA GRUP

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Prepared by: Hakan Çalışkantürk **2twoblackdots@gmail.com** **https://www.2blackdots.com**

Geopolitical and Global Developments:

WHILE THE U.S. STRIKES IRAN ON JUNE 22, 2025, IT ALSO THREATENS GLOBAL ENERGY SECURITY

1. THE MEANING OF THE STRIKE

1.1. Deterrence and Power Projection

The U.S. attack, particularly in response to Iran's accelerated nuclear program and its proxy activities in the region, constitutes a direct warning and demonstration of power. The use of Tomahawk missiles carries a "precision strike" message: a claim of a limited yet effective blow to Iran's military capacity.

1.2. Pre-Election Strategy of the Trump Administration

For the new U.S. administration that emerged after the 2024 elections (e.g., a Trump-led administration), such a foreign operation serves as a domestic show of leadership and toughness, while sending an external message that "the old order has returned."

1.3. Deepening U.S.-Israel Security Coordination Against the China-Russia-Iran Bloc

The synchronization with Israel's earlier June strike targeting Iran's nuclear infrastructure shows a deepening U.S.-Israel cooperation in regional security architecture. Beyond that, the operation reflects the alignment between the Trump administration and influential domestic actors such as the Jewish Lobby and Evangelical groups. It is clear that the strike aims not only to halt Iran's increasing integration into the China-Russia bloc via the Shanghai Cooperation Organization and BRICS+, but also to limit its growing influence.

The 25-year strategic agreement signed between China and Iran in 2023 has increased Chinese investment in Iran's infrastructure, energy, and defense sectors. Meanwhile, Russia has been collaborating with Iran in the Syrian theatre, in defense industries (e.g., drone and missile transfers), and in energy projects. In this context, Iran has become an advanced outpost of the China-Russia axis in the Middle East. By targeting Iran, the U.S. sends a message not just to Tehran, but also to Beijing and Moscow.

1.4. A Blow to China's Belt and Road Initiative (BRI)

Iran is a crucial node in China's Middle Corridor strategy, both via land routes (Iran–Turkey–Europe axis) and maritime corridors. The U.S. military move has the potential to destabilize the West Asia leg of BRI, putting China's energy security and logistics networks at risk.

1.5. Opening a New Front Against Russia

As Russia remains heavily engaged on the Ukrainian front, a new wave of instability through Iran in the Middle East could force it to divide its military and economic resources. Additionally, Russia's nuclear technology cooperation with Iran may have also been a hidden target of the strike.

This U.S. operation is not just a tactical military maneuver but a multi-layered geopolitical signal and a strategic positioning move. It represents the Middle Eastern leg of the long-term containment policy against China and Russia, intertwined with energy security concerns and reshaping alliance structures.

2. ANALYSIS IN TERMS OF ENERGY SECURITY

While the Iranian parliament approved a motion on Sunday to close the Strait of Hormuz, all eyes are now on the country's top security authority, the Supreme National Security Council. Following the U.S. bombing of three major Iranian nuclear facilities in the early hours of Sunday, the parliament took the first step toward shutting down the Strait, which is critical for global oil transportation and trade. The final decision on whether the Strait will be closed rests with the Supreme National Security Council.

2.1. Strategic Importance of the Strait of Hormuz

The Strait of Hormuz is one of the world's most critical chokepoints, with around 20% of global oil trade passing through it. Europe imports oil and liquefied natural gas (LNG) from Gulf countries like Saudi Arabia, Qatar, and the UAE—most of which travels through this strait.

Iran has frequently made threatening statements about the strait and possesses the capacity to disrupt energy flows through sea mines or drone attacks. Although the decision to close the strait is not yet finalized, Iranian MP and IRGC Commander Esmail Kosari has stated that "it remains on the agenda and will be done if necessary."

2.2. Rise in Oil and LNG Prices

A sudden rise in oil prices increases inflation and energy costs and could disrupt sectors across Europe—particularly manufacturing, transportation, and agriculture. Market reactions and volatility in European stock exchanges could trigger a chain reaction.

A full blockade could ignite military conflict involving the U.S., EU navies, and Gulf states, raising the risk of a broader regional war. Europe may be drawn into the conflict, especially through NATO obligations or via the naval presence of countries like France or the UK in the region.

Beyond oil, the Strait is a key route for global maritime trade. Disruptions could delay Europe's imports of raw materials, electronics, and consumer goods, affecting supply chains. Higher insurance premiums for shipping would raise costs for European businesses and consumers alike. In the immediate aftermath of the strike, oil and natural gas prices could spike—Brent crude may reach the $90–100 range.

This also threatens Europe's shift toward Qatari and Iranian LNG as alternatives to Russian gas.

2.3. Geo-Economic Cost of Military Operations

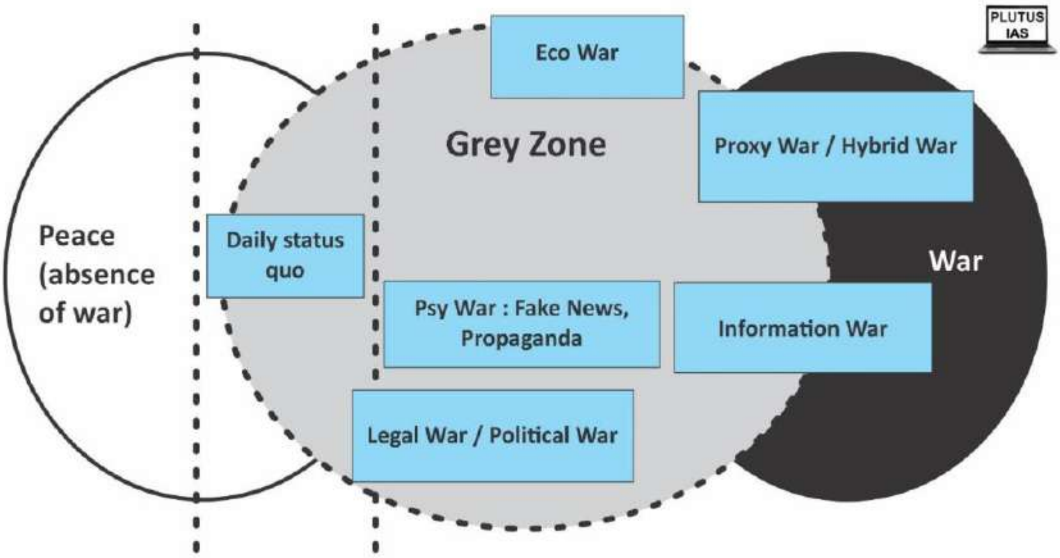
A potential retaliatory strike on Iran's energy infrastructure could upset the global supply-demand balance, not just regionally. For oil companies operating in the Gulf (e.g., Aramco, ADNOC), insurance costs would rise, and maritime transport would become significantly riskier.

2.4. Impact on China and India

China and India are the largest importers of Iranian oil. In a destabilized scenario, these nations would be forced to seek alternative sources, potentially redirecting geopolitical focus toward regions like Africa.

CONCLUSION

The U.S. strike on Iran on June 22 marks a shift toward hardened regional security dynamics and signals the onset of a new type of Cold War centered in the Middle East. The aftermath is likely to be defined by sub-threshold (Grey Zone Warfare) tactics, with both sides engaging in indirect, asymmetric methods. However, the risk of escalation into a full-scale conflict remains dangerously present.



https://plutusias.com/grey-zone-warfare/