

Will the Yemen War be the End of Saudi Arabia?

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The attack on Saudi Arabia's major oil processing station in Abqaiq over the weekend was a major turning point in global politics. It may be even bigger than many of us realize.

While forces within U.S. political circles, Israel and Saudi Arabia keep trying to shift the blame to Iran, the most likely scenario is that the Houthis in North Yemen were responsible for the attack as a follow up to last month's hit [which showed off the capabilities of their new drones](#).

That attack set the stage for the latest one in a classic case of the past being prologue. By showing the world it was capable of throwing drones anywhere in Saudi Arabia rebels in Yemen created plausibility for last weekend's attack.

And as I said the other day [this attack begs a lot of questions](#). And the ham-fisted push to blame Iran for it, after President Trump all but ruled out a military response from the U.S. from all corners of the U.S. and Saudi establishment opens up even more.

If this was a swarm attack from Iraq and Iran, as claimed now ([and supported by factless conjecture](#)) then how did all the vaunted U.S. technology fail to account for it?

U.S. Naval CENTCOM is in Bahrain folks. Are these people blind as well as incompetent?

No. I don't think they are. Say what you want about U.S. political leadership and the nigh-treasonous bureaucracy supporting it, I don't think our military is that fundamentally corrupt, lazy or stupid.

What are we spending all of the money on, after all?

By continuing to spin this attack up as Iranian in origin people like Secretary of State Mike Pompeo and the Saudi Arabian government are throwing the Pentagon under the bus.

The truth is that by trying to re-frame this as an attack by Iraqi Shi'ite militias, the Popular Mobilization Units (PMU), in conjunction with the IRGC, we are trying to further separate them from the Iraqi government who still openly support them and deflect against Saudi Arabia's inherent weakness.

The PMUs have been our target politically in Iraq for months now so as to restart the chaos in Iraq.

Iraq and Syria continue to try and re-open the Al-Bukumai border crossing near Deir Ezzor. In response to the drone attack on Saudi Arabia there were [two sets of airstrikes there on the 17th and the 18th](#). Saudi Arabia denies being involved and blamed Israel for the strikes.

The Shia Crescent is forming. The PMUs are an important part of this. Iran is investing billions in new road and rail links from Tehran to Beirut. So, the existential threat to Saudi Arabia and Israel is real.

Of that I have zero doubt.

But, notice what's happening. Everyone's pointing fingers at each other within the the U.S. alliance now.

Meanwhile Iran very calmly keeps denying the attack. I fully expect proof from them in the near future if the U.S. shows "proof" of Iran's involvement.

Think back to the drone incident in June which nearly landed us in a war with Iran. The story morphed and changed with each day. The Iranians had the data, the proof, on their side and they let morons like Pompeo say provably false things before releasing it.

"Drip Drip Drip" is the strategy, as Andrew Breitbart used to call it. Drip out some information and allow your target to lie about it. Then drip out the next bit exposing that lie. And so on, and so on.

That's what Iran did in June, humiliating Trump at every turn. And I'm sure if they weren't behind this attack they will do the same thing in the coming days.

And I also think the U.S knows this as well. And that's why nothing much more will come of it. It will be used diplomatically to tie Trump's hands and front a lie to conceal more important truths.

- The Saudi Arabians cannot defend their home. As [Moon of Alabama points out](#) Saudi air defense coverage is poor.
- [U.S. naval positioning](#) is not prepared for a step up in violence. Carrier Groups are not in the Persian Gulf.
- The Iranians believe they can hit targets up to 2000 kilometers away. How true that is versus U.S. air defense systems is questionable.
- The Saudis have lost nearly all of their external support. The coalition against Yemen has collapsed.
- The Houthis are winning.
- Qatar hates them.
- Egypt wouldn't join Trump's Arab NATO.
- OPEC+ is floundering and Russia sets the tone.

And this brings me to the stark possibility [Pepe Escobar laid out in his recent column](#). The Houthis may, right now, be in a position to launch an all-out attack from Yemen on Saudi Arabia and destabilize the country.

The situation has now reached a point where there's plenty of chatter across the Persian Gulf about a spectacular scenario: the Houthis investing in a mad dash across the Arabian desert to capture Mecca and Medina in conjunction with a mass Shiite uprising in the Eastern oil belt. That's not far-fetched anymore. Stranger things have happened in the Middle East. After all, the Saudis can't even win a bar brawl – that's why they rely on mercenaries.

An uprising in the east has always been on the table. It's why the Saudis need \$80+ per barrel oil. They have to pay for social programs that keep the population relatively happy.

From every side now, the Saudi Kingdom is under existential threat. So, I'm not surprised they are trying to push the blame for this incident onto Iran.

The quick announcement by newly-minted Saudi Energy Minister Prince Abdulaziz bin Salman that Aramco's production will be back to normal quickly was done to reassure potential investors in the upcoming Aramco IPO, a \$400 billion affair. It is the lynchpin to Crown Prince Mohammed bin Salman's (MbS) Vision 2030 plan for modernizing the kingdom's economy.

That fits with the desire to deflect the source of the attack away from their war in Yemen. Because, as bad as the optics are for the U.S. military, they are far worse for the Saudis if the Houthis are truly the culprits.

At a minimum the changing of the energy minister was a signal that a shift in Saudi policy is forthcoming. But without suing for peace soon MbS may not have time he thought he did.

Because there is no appetite for all out war with Iran in the U.S. The Saudis are no longer the 'good Arabs' to most Americans.

The military doesn't want to put the soldiers at risk, Wall St. doesn't want to see a financial collapse that makes Lehman Bros. look like a couple of Amish kids on rumspringa.

The MIC doesn't want to expose their toys to the potential for them failing to dominate in the field.

War with Iran will not be conventional. It will come from all sides, all across the Shia Crescent, but especially Yemen. Of this the Iranians have been very clear, regardless of the outcome. They believe their missile technology is superior to U.S. air defense systems.

They may be correct and the last thing the U.S. wants is an actual shooting war where the outcome isn't a foregone conclusion. The U.S. military is better served as a bogeyman, politically, rather than an actual physical threat.

So, MbS better come to the conclusion quick that a settlement in Yemen is the key to his near-term survival. Because in a quick strike by the Houthis which creates an uprising across the country there's precious little the U.S. can or will do to oppose that.

And while an all-out war would certainly bring \$150+ per barrel oil which the Saudis need to balance their budget, they most likely wouldn't be the ones selling into that market.

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Tom Luongo is publisher of the Gold Goats n Guns. Ruminations on Geopolitics, Markets and Goats.

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