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UNIDAD DE ANÁLISIS POLÍTICO Y SEGURIDAD CORPORATIVA

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Bab el-Mandeb: From Trade Corridor to Instrument of Geopolitical Coercion

Bab el-Mandeb is one of the world's principal maritime chokepoints. It links the Gulf of Aden to the Red Sea and, through it, to the Suez Canal, forming the shortest trade route connecting Asia, Europe, and the Middle East. For decades, its strategic importance was treated as a structural feature of the international trading system; in 2026, it became an active political variable. This shift is a direct consequence of the war involving the United States, Israel, and Iran. Following the attacks of February 28, Tehran largely closed the Strait of Hormuz to global traffic, and Egypt estimated losses of nearly USD 10.5 billion resulting from disruption to navigation through Suez. In response, countries such as Saudi Arabia activated their long-standing contingency plan: the East-West Pipeline (Petroline). During the first quarter of 2026, the pipeline reached a record throughput of 7 million barrels per day, enabling Saudi exports to completely bypass Hormuz ([Egypt Today, 2026](#)). By July, nearly 75% of Saudi crude exports were shipped through Yanbu on the Red Sea coast, and the Kingdom's exports passing through the strait increased eightfold compared with the same period in 2025 ([LISA News, 2026](#); [Fortune,](#)

[2026](#)). As a result, Bab el-Mandeb ceased to be a secondary route and became the only remaining maritime alternative available to Saudi Arabia, and therefore a central pillar of its energy security.

The Houthis accurately recognized this dependency. Their declaration of a naval blockade is not intended to physically destroy trade, a capability they do not possess, but rather to impose a disproportionate strategic cost. Messages directed at shipping companies warned against any activity in Saudi ports, even for vessels with no direct connection to the Kingdom, stating that they could be targeted "anywhere." This ambiguity is deliberate. The objective is not to sink ships, but to create uncertainty that forces each shipowner to reassess risk independently.

"The effective closure of Hormuz has disrupted nearly one-third of global fertilizer trade"

Events on August 11 confirmed this pattern without contradicting its underlying logic: the Yemeni Coast Guard reported six fatalities following an attack on the vessel Tihamah, including three Pakistani nationals and one Indonesian crew member; moreover, an additional missile reportedly targeted rescue teams responding to the incident ([The New Arab, 2026](#)). Days earlier, the port of Mocha, the largest port facility controlled by Yemen's internationally recognized government and located directly on the strait, was bombed, reigniting dimensions of Yemen's internal conflict ([Middle East Eye, 2026](#); [Infobae, 2026](#)).

Although the Houthis operate according to their own agenda, their ability to threaten maritime traffic indirectly strengthens Iran's strategic position. Tehran now exerts simultaneous pressure on the world's two most important energy corridors: Hormuz in the east and Bab el-Mandeb in the west. On August 10, Brent crude rose above USD 86 per barrel while Iran conditioned the reopening of Hormuz on the lifting of the U.S. naval blockade and compensation for war damages. Crude oil and condensate flows through the region increased from 3.7 million barrels per day in the first quarter of 2025 to 5.4 million during the same period in 2026, while LNG traffic, which had been suspended during the second quarter of 2025, recovered to 2.9 billion cubic feet per day ([Infobae, 2026](#)).

However, Bab el-Mandeb is not traversed solely by oil tankers. Bulk carriers transporting grain and steel, container ships carrying manufactured consumer

goods, and LPG carriers supplying fuel for cooking and heating also depend on this route. In addition, the strait plays a less conventional but equally critical role: approximately 70% of container traffic between Europe and Asia and around 17% of global data traffic pass through this corridor. No other maritime passage in the world concentrates so many dependencies, energy, food, manufactured goods, and information, within a mere 29-kilometer-wide channel. Consequently, rerouting vessels around the Cape of Good Hope adds between 18 and 22 days to voyages, requiring approximately 12,000 additional kilometers and absorbing between 8% and 12% of global container shipping capacity ([Cadena Cinco, 2026](#)). Asia-Europe freight rates remain between 25% and 40% above pre-crisis levels, with additional costs ranging from USD 800 to USD 1,500 per forty-foot container. From the perspective of International Political Economy, the most significant finding is that markets penalize uncertainty more heavily than actual damage. War-risk insurance premiums rose from roughly 0.3% to 0.75% of insured value within days, while quotations for vessels associated with Saudi ports in the southern Red Sea reached as high as 3%, compared with just 0.1% for Jeddah and Yanbu. Transit volumes declined by approximately 36%, and the conventional tanker segment contracted by 42% during the week following the blockade announcement. Yeda y Yanbu. Transit volumes declined by approximately 36%, and the conventional tanker segment contracted by 42% during the week following the blockade announcement ([Data Portuaria, 2026](#)).

The same mechanism is now affecting the global food supply chain at three interconnected points. Bab el-Mandeb carries significant volumes of wheat and corn, along with smaller quantities of barley, soybean meal, and sunflower meal, supplied primarily by Russia and Ukraine, followed by Romania, Argentina, and Australia (Portal Marítimo, 2024). This is particularly important because the commodities passing through the strait originate in a region that is confronting its own navigational crisis. On August 8, Turkey suspended transit permits through the Dardanelles for vessels bound for Novorossiysk and Ukrainian ports following drone attacks against Turkish-owned ships, at a time when wheat prices had reached two-year highs. Although transit resumed the following day, the episode remains highly significant. Under the Montreux Convention, Ankara may restrict warship passage during times of conflict. In this case, however, restrictions were implemented through administrative mechanisms, permits and security assessments, without formally invoking the legal framework. This establishes an important precedent for the governance of

strategic straits worldwide. As a result, the supply chain now faces compression at its origin (the Black Sea), in intermediate transit (the Turkish Straits), and in final transit (Bab el-Mandeb), despite the absence of a physical blockade at any of the three points (Data Portuaria, 2026). Furthermore, the effective closure of Hormuz has disrupted nearly one-third of global fertilizer trade, leaving an estimated 3 to 4 million metric tons per month unable to reach international markets. Sudan imports 54% of its fertilizers from Gulf suppliers, while Kenya sources nearly 40% from the region and depends on imports for approximately 90% of its wheat consumption. There is also a counterintuitive effect: shipping capacity immobilized by longer routes artificially sustains freight rates in a structurally oversupplied market. Maritime traffic through Bab el-Mandeb remained at its lowest level since 2019 in early August, while activity through the Strait of Hormuz continued to be severely restricted, averaging only four vessels per day, and traffic through Suez has recovered only slowly (Confluencia Portuaria, 2026). A full reopening of Suez would release this trapped capacity within four to six weeks and could reduce freight rates by between 20% and 30%. Even so, ambiguous economic incentives regarding conflict resolution remain evident (UN News, 2026; Al Jazeera, 2026).

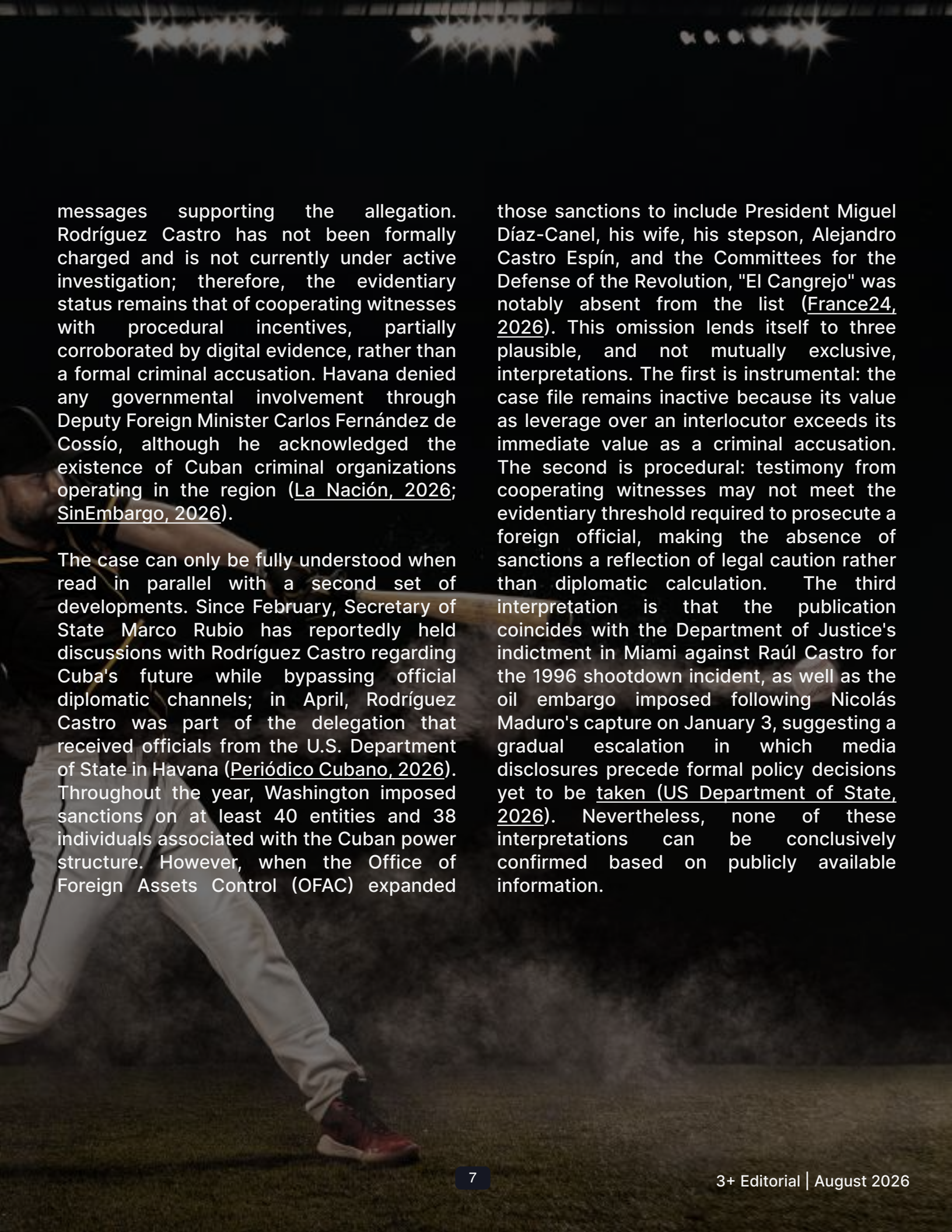


The institutional response highlights a significant governance gap. The European Union's military operation Aspides, launched in response to Houthi attacks on international shipping, maintains an average deployment of only three warships, despite estimates suggesting that ten vessels are necessary to provide effective coverage. Meanwhile, Washington implemented a USD 20 billion reinsurance program aimed at restoring confidence among private insurers ([EuroEFE, 2026](#)). States are thus increasingly assuming the residual risk associated with global public good that markets can no longer price effectively. The consequences, however, are distributed unevenly, as costs are ultimately transferred to importing economies. Route diversions increase transportation costs, transit times, port congestion, and supply-chain vulnerability, with disproportionately severe consequences for developing countries. Latin America and the Caribbean, for example, absorb the shock through three simultaneous channels: shipping rates, agricultural input costs, and insurance premiums. Bab el-Mandeb is no longer merely a trade corridor; it has become an instrument of geopolitical coercion whose effectiveness lies precisely in the fact that it does not need to be fully closed to function.



México y los cubanos, con los Estados Unidos entrelazados

The New York Times investigation published on August 11, 2026, reopened a seemingly closed case and attached a new name to it. In 2020, the U.S. Department of Justice charged several Cuban nationals residing in Mexico with belonging to the "Cuban Mafia in Quintana Roo," a criminal network that, since 2009, had stolen vessels in southwest Florida to smuggle migrants from Cuba into Mexico and the United States. The organization used stolen credit cards to purchase goods that were subsequently smuggled into Cuba and was linked to the theft of more than 600 outboard motors in Tampa. Its business model also included the kidnapping of migrants in transit, ransom demands of approximately USD 10,000, and the use of torture as a collection mechanism (The New York Times, 2026; Department of Justice, 2023). Operation Sisyphus, conducted by the FBI and Homeland Security Investigations, resulted in prison sentences of several decades for at least 21 individuals. The new element is Raúl Guillermo Rodríguez Castro, known as "El Cangrejo" ("The Crab"), a colonel in Cuba's Ministry of the Interior and grandson of Raúl Castro. González Vidal, who was sentenced to 25 years in prison, stated that Rodríguez Castro facilitated the organization's safe movement to and from Cuba in exchange for a boat, a Rolex watch, a motorcycle, and luxury clothing. According to reports, the FBI recovered text and voice



messages supporting the allegation. Rodríguez Castro has not been formally charged and is not currently under active investigation; therefore, the evidentiary status remains that of cooperating witnesses with procedural incentives, partially corroborated by digital evidence, rather than a formal criminal accusation. Havana denied any governmental involvement through Deputy Foreign Minister Carlos Fernández de Cossío, although he acknowledged the existence of Cuban criminal organizations operating in the region ([La Nación, 2026](#); [SinEmbargo, 2026](#)).

The case can only be fully understood when read in parallel with a second set of developments. Since February, Secretary of State Marco Rubio has reportedly held discussions with Rodríguez Castro regarding Cuba's future while bypassing official diplomatic channels; in April, Rodríguez Castro was part of the delegation that received officials from the U.S. Department of State in Havana ([Periódico Cubano, 2026](#)). Throughout the year, Washington imposed sanctions on at least 40 entities and 38 individuals associated with the Cuban power structure. However, when the Office of Foreign Assets Control (OFAC) expanded

those sanctions to include President Miguel Díaz-Canel, his wife, his stepson, Alejandro Castro Espín, and the Committees for the Defense of the Revolution, "El Cangrejo" was notably absent from the list ([France24, 2026](#)). This omission lends itself to three plausible, and not mutually exclusive, interpretations. The first is instrumental: the case file remains inactive because its value as leverage over an interlocutor exceeds its immediate value as a criminal accusation. The second is procedural: testimony from cooperating witnesses may not meet the evidentiary threshold required to prosecute a foreign official, making the absence of sanctions a reflection of legal caution rather than diplomatic calculation. The third interpretation is that the publication coincides with the Department of Justice's indictment in Miami against Raúl Castro for the 1996 shutdown incident, as well as the oil embargo imposed following Nicolás Maduro's capture on January 3, suggesting a gradual escalation in which media disclosures precede formal policy decisions yet to be taken ([US Department of State, 2026](#)). Nevertheless, none of these interpretations can be conclusively confirmed based on publicly available information.



Mexico's Security Cabinet stated that it possessed neither "information nor independent evidence" regarding the allegations. The significant point is that the judicial truth concerning a criminal phenomenon that developed over fifteen years on Mexican territory was established entirely in Florida courts (MVS Noticias, 2026). This asymmetry, where one side produces intelligence, evidence, and convictions while the other manages a position of non-knowledge, constitutes a structural indicator of differing institutional capacities and priorities, regardless of political interpretations that attribute the silence to ideological alignment between Morena and the Cuban Communist Party. Furthermore, Cuban criminal activity in Quintana Roo dates back to the administration of Mario Villanueva, placing the phenomenon within the category of a long-standing, low-visibility structural problem rather than a recent development. From this arises the first risk: a diplomatic vulnerability with an uncertain expiration date. Mexico's position remains sustainable

only so long as Washington chooses not to activate the case. Should it do so, Mexico would face scrutiny regarding events that occurred on its own territory, within a bilateral relationship where tariff threats have increasingly become a principal mechanism of pressure. This point is particularly relevant because, between January 20, 2025, and March 9, 2026, the United States deported more than 18,000 third-country nationals. Approximately 13,000 of them, or 70%, were sent to Mexico under the terms of an unpublished bilateral agreement. Cubans constituted the largest group, totaling 4,353 individuals: 55% had prior convictions, 16% had pending criminal charges, and 26% had no criminal record. Only 16% had a violent or potentially violent offense as their most serious conviction (HRW, 2026). Many had lived in the United States for years or even decades and had long-standing deportation orders that historically could not be enforced because Havana refused to accept their return. The practical consequence is the emergence of a population trapped in indefinite legal limbo. Mexican regulations require applicants before the Mexican Commission for Refugee Assistance (COMAR) to remain in the state where they filed their claims, effectively immobilizing them in cities such as Tapachula and Villahermosa, locations frequently associated with extortion, kidnapping, and human trafficking. Activists estimate that approximately 800 migrants are stranded in Tapachula and nearly 3,000 in Villahermosa. Many attempt to relocate to Cancún in search of informal employment, despite the absence of specialized shelters in Quintana Roo. Human Rights Watch has documented cases of extortion, threats, and kidnappings targeting deportees and has warned that some ultimately become recruits for criminal organizations (HRW, 2026).

The central point of convergence is that the same policy that judicially dismantled the network's supply chain in the north is simultaneously depositing, through Mexico's southern border and without legal status or institutional support, the very population that the criminal model monetized for fifteen years. A portion of this population gravitates toward the same territory where the network once operated. This does not imply the automatic reconstitution of the organization, whose leadership structure has been dismantled and convicted. However, it does recreate the supply-side conditions that originally made the enterprise profitable: a captive, undocumented population with little ability or willingness to report criminal activity. The more than 90% reduction in illegal border crossings documented between October 2024 and May 2026 reflects a displacement of risk rather than its elimination (El Economista, 2026). At the same time, the predictable stigmatization of the Cuban community following the media coverage deepens the social exclusion that generates vulnerability.

Against this backdrop, the risk in Quintana Roo is defined more by convergence than by the intensity of criminal activity itself. Extortion increased by 62% in 2025, with

162 reported cases between January and November, more than 85% of them concentrated in Cancún. Approximately 700 businesses closed, while sales in the formal commercial sector declined between 30% and 40% during the second half of the year. For operators in the hospitality, maritime, real estate, and transportation sectors, the critical threat is not opportunistic crime but logistical infiltration through marinas, vessel leasing services, transportation networks, and informal hiring practices, precisely the links that the criminal network exploited from its inception (Caribe Peninsular, 2026). The dominant legal risk, however, is extraterritorial. With Mexican criminal organizations designated as Foreign Terrorist Organizations, payments of *cobro de piso* (protection money) cease to be merely a local business cost and instead become potential material support under U.S. law. The financial precedent was established in June 2025 with the designation of CIBanco, InterCam, and Vector under the FENTANYL Act, which triggered widespread banking de-risking throughout the financial sector (Expansión Política, 2026). A high-profile case associated with the label of a "Cuban mafia" increases the likelihood of OFAC scrutiny over payment chains linked to the Mexican Caribbean's tourism and real-estate sectors.



The government is dealing with crises on two fronts, the humanitarian and the military

The earthquake on August 10 caused an abrupt redistribution of institutional attention. In crisis governance, attention is a scarce resource comparable to a budget, since what is assigned to one priority is taken away from the capacity available for others. Under this logic, the analytical significance of the event lies not only in physical damage but also in its effects on the state's ability to oversee, coordinate, and simultaneously evaluate high-impact decisions made on other fronts. The magnitude 7.4 earthquake, with its epicenter in San José del Palmar (Chocó), critically hit the Coffee Axis, Chocó, and Valle del Cauca; the latest report from the National Unit for Disaster Risk Management records 289 deaths, 4,187 injured, 143 missing, 27,557 damaged houses, 26,945 destroyed, and 66 collapsed buildings ([Vanguardia, 2026](#)). Additionally, it occurred just three days after Abelardo de la Espriella's inauguration, that is, over an administration that had not yet reached its operational setup.

In that context, between the night of August 10 and the early hours of August 11, the Military Forces carried out Operation Beta, the first airstrike of the current administration against illegal armed groups. Kfir jets dropped four bombs on a spot identified by intelligence in a rural area between San Calixto and Tibú, Norte de Santander, following previous clashes between the Joint Special Operations Command and members of the ELN's Northeastern War Front. The Ministry of Defense reported two alleged ELN members killed, five camps and two bunkers destroyed, about 1.5 tons of explosives seized, and 440 grenades adapted for drone launches.

The Ombudsman's Office, for its part, reported that at least three farmers, including a 44-year-old woman, were injured in San Calixto, while the Minister of Defense, retired General Jorge Mora, denied that the Public Force had operated in that area and ruled out any impact on civilians([BluRadio, 2026](#); [Ombudsman Office, 2026](#)).



The timing of both events doesn't allow us to infer intent, but it does highlight a recurring phenomenon in exceptional situations: the overlap of demands on the same institutional capacities. The agencies responsible for monitoring, verifying, and documenting impacts from the use of force had to deal with a national-scale natural emergency at the same time. The challenge isn't in the willingness of institutions to act, but in the operational limits that arise when multiple crises compete for the same personnel.

That restriction matters because early verification influences subsequent processes. The Colombian experience shows that the quality and timeliness of evidence collected in the first days determine the state's ability to assign responsibilities and resolve disputes, and the discrepancy between the Ombudsman and the Ministry of Defense over the very location of the bombing illustrates the point, since without quick independent verification, the factual dispute solidifies and carries over, unresolved, to administrative, judicial, or disciplinary bodies ([EL TIEMPO, 2026](#)). Any temporary reduction in observation capacity, therefore, has long-term institutional implications. Adding to that is a demanding mix of concurrent missions for the Public Force, including humanitarian response and support, maintaining public order—including containing looting in affected areas—and a military pressure strategy on armed groups announced as a government priority. The predictable effect is a disruption in state presence, given the concentration of resources in disaster areas, temporarily reducing the capacity to intervene in peripheral territories where disputes over social and economic control continue.

The case of Chocó combines both conditions at the same time, since it is both the epicenter of the earthquake and a territory with low connectivity and a historical presence of armed groups. Requests from indigenous communities and local organizations for humanitarian aid to be accompanied by mechanisms for monitoring and protecting human rights respond precisely to that risk. In places where institutional access is intermittent, managing mobility and supply corridors becomes a source of legitimacy for whoever facilitates or restricts passage ([France24, 2026](#)). The challenge, then, is for aid to strengthen the legitimate presence of the state and not reproduce mediation schemes that consolidate de facto authorities.



Foto: Revista Semana 2026

The fiscal dimension adds another layer of complexity. The promise to adjust spending that De la Espriella made when he came to the Presidency lasted only three days, since the earthquake forced that plan to be redirected toward a reconstruction whose initial estimates are around 30 trillion pesos. On August 17, the president announced the creation of the Miracle Fund, after declaring an economic emergency, as a tool to channel national and international contributions, along with the Miracle Reconstruction Plan led by the Ministry of Housing. Reconstruction and security aren't mutually exclusive goals, but they compete for limited resources; the question isn't which agenda prevails, but under what criteria priorities are set and how the allocation is publicly justified in a financially constrained environment. On top of that tension, the emergency allows for

decrees with the force of law that must remain directly linked to the causes and effects of the earthquake and are subject to review by the Constitutional Court, so the actual scope of the measures will only be known when the articles are published ([Portafolio, 2026](#)).

Last but not least, the reputational front opened before the execution even started. The release of videos of the Housing Minister, Jaime Andrés Beltrán, in Santa Marta during the long holiday weekend, while the country was dealing with the emergency, led to the announcement of a censure motion promoted by members of the Historical Pact. The proposal requires the support of a tenth of the members of the Chamber for its processing, and Representative Alejandro Toro stated that the initiative already has the required backing ([El Colombiano, 2026](#)).

The likelihood of approval is low, but its significance is another matter. First, because the official being questioned heads the Miracle Plan, so the controversy doesn't fall on a peripheral department but on the main driver of the reconstruction. Second, because the mechanism, even if it fails, creates a documentary record that will be available for later political oversight. Third, because it sets up early on a narrative of disconnection that will politically raise the cost of any future delays in the victim's census and subsidy distribution. It's also worth highlighting that the escalation has an element of opposition positioning, not just of oversight.

This connects with the very design of the government response —visible leadership, centralized coordination, and early demonstrations of operational capacity. Such strategies help with public communication and



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the perception of control in the early stages, but they concentrate the reputational costs of mistakes, delays, and controversies on the Executive. In this sense, the individual failure of a minister doesn't stay within their department; it goes straight to the center. As a result, the earthquake didn't halt the political dynamics or discussions about security, public spending, and state management; it reshaped them under extraordinary conditions. The question now isn't just about how the immediate emergency was handled, but whether the decisions made during this period —in security, reconstruction, and resource management— will hold legitimacy and institutional strength when public attention, political oversight, and media scrutiny return to their usual levels. Aftershocks are expected and decrease in intensity; but the institutional consequences of decisions made during a crisis are less predictable and show up over a longer term.

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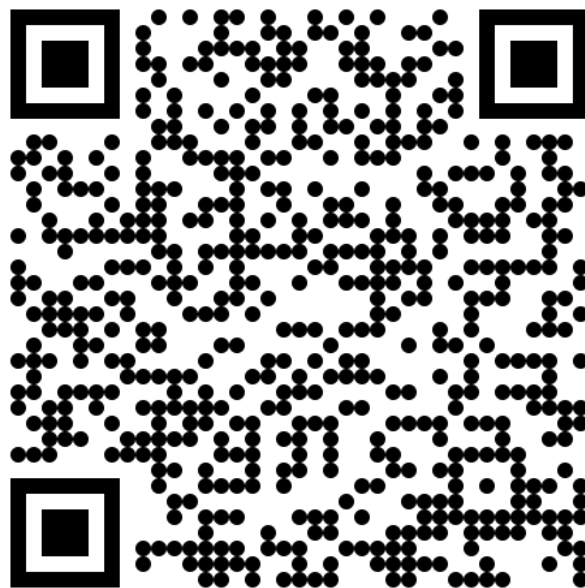
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