

Transcript — How the “Islamic NATO” Shifts Global Geopolitics

Christian Smith: Hello and welcome to this special extended edition podcast from Geopolitical Futures. Last week, Turkey, Saudi Arabia and Pakistan signed a mutual defense pact that could prove a watershed moment for the Middle east and the wider world. They're calling the agreement the Islamic NATO because amongst other things, it includes A NATO Article 5 style clause promising in effect that an attack on one is an attack on all. If it holds, the alliance could form a long term defense structure for the region and its ripples will be felt much further from India to China to the US and the world at large, a world that is very much in realignment. And to do so we are joined by Geopolitical Futures Chairman and founder George Friedman and and by Kamran Bukhari, a GPF contributor and Senior Director of the Eurasian Security and Prosperity Portfolio at the New Lines Institute in Washington. Welcome to you both. I want to start with a high level question, really, which is how big a deal is this both for the region or for the world more generally?

George Friedman: Well, for the region it's enormous. It creates a potential center of gravity around which the region will operate and having the power to in many ways organize this region for the world. The Middle east becoming coherent and more powerful will have a significant effect, particularly in the regions around the Middle east, say India, China, as well as to some extent Europe. They'll be deeply affected, along with relieving the American duty or lack of duty, but still involvement in the region.

C: I agree with George. I'll add that this is probably, or in my view definitively the most volatile region of the world. There's always conflict. There are many fault lines. There have been since the end of World War I. So yes, finally you have the makings, the early sort of pieces of an architecture that, an emerging architecture. But it's also, in my view, significant for the globe because it fits very nicely with the US attempt to retrench itself and the whole burden sharing and burden shifting doctrine that the current administration has been rolling out. And we see this playing out with the Europeans taking up more responsibility with regards to Ukraine. We see this happening in the Western Pacific with the remilitarization of Japan and other allies coming together to maintain security and

stability in that part of the world. In the Middle east, it was always a challenge, who's going to do this? And it was not going to be, you know, the smaller players. It had to be the big players. But even amongst the big players you have disparity. Turkey is a major strategic power. It is a major military force. It does have the geopolitical heft to, to undertake this kind of role. But Saudi Arabia has the financial power, but not necessarily the strategic power, at least not in the military sense. So this was always going to be a tag team. And given the historical relationship between the Turks and the Saudis, it was difficult to see that they would just be the primary players in this. And so therefore Pakistan being brought in actually ahead of time by the Saudis last year, you know, makes more sense, brings more coherence to this emerging picture. If I had to bet, I'd say, you know, at some point Egypt will be brought into this space as well, and there'll be other smaller actors playing a role as well.

Christian Smith: Well, look, let's break that down a little bit, Kamaran. I mean, you wrote an article last week for Geopolitical Futures, actually just a few days before this announcement came out, pointing out the need for something like this. We've actually spoken a few times on this podcast about the growing friendship, for want of a better word, between Turkey and Saudi Arabia as sort of balancing forces in the Middle East. A decade ago, something like that would have seemed fanciful, where they were more like rivals. What made you think that this would be happening, that this would happen, when you wrote that piece last week?

C: So in all honesty, I didn't know of the timing. There was talk about it in the open sources. But this is something, you know, as you noted in your comments, that you and I have been talking about in, you know, in, on this podcast. I've written several articles on the GPF website on this very topic. So it's, it's a, you know, I guess it was a coincidence that, you know, two days later they, they actually announced it, but it's been in the making for a long time. And so, and it, I mean, look, if you just sort of step back and look at the region and look at the broader globe, if the United States is saying we're done, we're not going to be doing what we have been since the end of World War II, and we're retrenching at least from the Eurasian landmass and not necessarily from the, the maritime spaces, then the big question is who's going to take over it? In Europe, there is an architecture already in existence, both in the form of the European Union and NATO. Now, obviously, those need a lot of work because NATO worked, because

the United States led it. Now, how will the Europeans deal with that? That's a separate story. And in the Middle east, you have nothing at all approaching even anything remotely similar. So here you have to wonder who are the allies of the United States? Because this is about allied and partner nations picking up. And you have a region that has been the target of over four decades of Iranian efforts to reshape the architecture, to undermine the US Led efforts for almost now half a century. You have Israel fighting on multiple fronts. So this really complicated the picture. So who's going to step into this mix? And therefore it made sense that you have the region's largest Arab state by economic power and Turkey, which is the big player here, but Turkey has also been playing in multiple regions. So but beyond that, you know, Egypt has been inert, as in geopolitical terms for a very long time. And so you couldn't sort of say, hey, Egypt is going to take the lead. So I guess this was in many ways inevitable because if you're one of these countries, you know, you're Turkey or Saudi Arabia and even the others, the first question on your mind is, well, if the US Is no longer going to do what it's been doing for, you know, forever, then who does it? Who will take care of security? And so the smaller players can't jump in without some big partner. So it made sense for these big players to step forward and say, well, we have interests to protect and if the United States is offloading responsibility, then even if we don't like to do this, then we will be forced to do it.

Christian Smith: Want to come in a minute to sort of the viability of the pact? But while we're just talking about the founding members, I suppose Pakistan you mentioned earlier, Dar and there, that's interesting. I mean, one of the immediate reactions from many people have been to point out Pakistan's recent role as a sort of mediator between the US And Iran. Pakistan, although has not been a obvious, has not even been close to an ally of Iran or anything like that. It has been targeted itself by Iran in the past. What's its role there?

C: So I think that you have to understand what the Pakistani imperative is here. Pakistan has a lot of social, political, economic security problems that it's been wrestling with for a long time. And it's some, it's a country that's been, you know, at the, you know, economic precipice for a very long time, dodging the bullet over and over again. And if it needs financial assistance, the days when the United States would just sort of send cash because it was the Cold War logic made sense or the war on terror logic made sense, they're long gone. And so the Pakistanis

have been increasingly relying on the Chinese, but also to the Saudis and UAE and countries like Qatar. So if this is the need of the Pakistanis and the Saudis are saying, well, we need somebody to help us with our security needs. So you can see how this is a very convenient, if you will, partnership. One side brings cash to the table, the other side brings military power and you solve the problems of both sides. So yes, Pakistan has a lot of problems that it needs to solve on the domestic front, but it relies on Saudi Arabia heavily. From a Pakistani point of view, you can't watch the Saudis descend into chaos. I mean, that's just an intolerable. It's a direct security threat for Pakistan because of the dependency, the nature of the relationship. So you have no choice but to join this. You'll still be focused on the home front, but you can't sequence this. You can't sort of say, well, let me first fix the home front and then I'll come, we'll do this in a couple of years or whenever we're free. That's not how it happens. That's real time. And this is real time as well. Plus, Iran is a neighbor as well. And if Iran is mired in uncertainty, what is the future of Iran? Is it going to be coherent? Is it going to descend into chaos? A war with the United States? You know, it's on their borders and this is the western flank of Pakistan, which is where their major vulnerability point is. They're already fighting two insurgencies on that western flank, everything west of the Indus River. So then again, it makes sense for the Pakistanis to say, yes, we'll play the role of mediator. Well, we don't know how successful we will be, but we need to. And of course, Pakistan needs the United States for a whole host of things and therefore it makes sense for them to help out the Americans and hope that the Americans will reciprocate in ways that are beneficial, largely economic, but beneficial to the Pakistanis. So that to me is the logic here.

Christian Smith: Take a moment to follow and rate us on your preferred podcast platform. If you're already watching on YouTube, don't forget to like and subscribe. George, coming to you. The, The NATO Article 5 side of things. The, the mutual defense pact. I mean, NATO was built on quite a solid foundation. I suppose it was an anti communist alliance that wanted to stop communism rolling into Western Europe and the rest of the world. It was, it was agreed not long after the continent had fought a major war that was fresh in their minds. We have, of course, now, many years later, had many discussions around how viable, how, how believable that mutual defense pact is. We hear every other day about stories about how Vladimir Putin might want to test that. How viable do you think this is for in the Middle East? These countries have, have not always seen eye to eye.

They're not necessarily united against a common ideology like communism. Is it going to be believable to those in the region?

George Friedman: Well, they have a fundamental interest in ending the war in Iran, okay, Particularly Saudi Arabia, which exports oil. The Red Sea is now closing through it, as well as Pakistan, who sees Iran as a potential threat in the long run. And so when we take a look at this system, compare it to NATO first. Remember, NATO was not an elective alliance. Wasn't European nations suddenly deciding to form an alliance and taking care of was a creation of the United States because the Europeans at the time it was formed had no massive militaries that could take on the Soviets, wrecked economies and everything else. So in many ways, NATO was an American tool to both rehabilitate Europe and block the Soviets. This does not involve any great power in being made. This is something that the nations of the region on their own decided to do. I had expected an emergence of an alliance between Turkey and Saudi Arabia for a very good reason. Turkey has an enormous military, second largest in NATO, but its economy needs investment, needs help. The Saudis are very rich. The most dangerous thing in the world is to be rich and weak. And the Saudis are militarily weak. So I expected an alliance to emerge and was emerging between Turkey. That has been an emerging power and is quite significant not only in the Middle east, but to some extent in Europe because it's also a member of NATO with a great deal of influence in the Balkans. Okay, historically. So we take a look at the situation that has emerged there. These are very different situations. One was a creation of the United States designed along with economics to revive Europe and defend Europe. Now it's a European entity because the United States is backing off. And the Europeans feel quite betrayed because they didn't expect to have this responsibility put back on them. In this case, the United States may have been aware of this evolving, likely was happy evolving, but this was an evolution within them. It's one I expected between Turkey and Saudi Arabia. I did not expect Pakistan in it. But when you look at a map of Iran, which is a basic problem in the region because it supports non state actors, people like Habas, Hezbollah, all these things, the Houthis, they are in ways supported by Iran and It has to be understood that many of the nations in the Middle east do not welcome these non state actors, to say the least. They are disruptive within their own countries, getting their countries involved in things they don't want to be involved in. So when you take a look at Saudi Arabia, Turkey, Pakistan, they also likely have an

interest in limiting, if not crushing, but certainly limiting the viability of these non state actors. Turkey has problems with them, Saudi Arabia has many problems with them, and so on. So when you look at this alignment, it also creates a force that can possibly discipline control, undermine non state actors at the same time as forming a coalition around Iran, partly by doing that. And so from the American point of view, and I suspect American intelligence was knowing this was evolving, I hope, but from our point of view, this is a wonderful event. Now Iran is in a way surrounded by, by an alliance that's essentially hostile to Iran. But we have to understand two dimensions here. One is the Iran war, which is critical not only because Iran is potentially a powerful nation blocking the Straits of Hormuz, allied with the Houthis and everything else. It's also the major sponsor of non state actors. And there is a view in the United States at least that that the Islamic countries all support these non state actors. But they may not be necessarily loving, they won't express complete condemnation, but many of them fear it as well. So what we're looking at here is an organization that addresses both the fundamental problem of Iran and, and its actions and the non state actors. And it's a very strategic event. So although I really think this was decided among them, I'm sure the United States was quite happy to see it evolving. I'm sure the Iranians don't like this and therefore groups like Hezbollah are now looking at the question of how much longer they can rely on Iran. So there are dimensions to this that we have to consider. Most of them hostile to Iran and non state actors and in America's interest in many ways.

Christian Smith: Yeah, the way this ripples out is really quite extraordinary in terms of those who are affected. Kamaran, you've said there, George, about the effect on Iran. Let's talk about that for a moment. I think Iran has come out and said that they're not bothered by this. I mean, of course they would say that. How do you think they're actually feeling about this? Do you think that this is to them something serious to be concerned about? Or is it just a development, a next step in probably what they already knew, that these countries, particularly Saudi and Turkey, are not exactly their best friends.

C: Yeah, that's a great question, Chris. I think it's a mixed bag. If you look at it right now, right now it's a document that has been signed. And by the time this document actually turns into a functioning alliance, it's going to be a long time. There are all sorts of issues that have to be sorted out. The rules of engagement,

the command structure, staffing this alliance, where will it be based there. The questions are endless. And I'm, you know, these are things that the stakeholders haven't figured out. When Iran looks at that and says, okay, you know what, this isn't something that we need to worry about just yet. But at the same time, they can't help but, you know, appreciate that this is something that's not happened in the past and therefore they need to take this seriously. They're seriously. Because a. Iran is in the weakest position it's ever been since the founding of the regime almost 50 years ago. And until 2024, Turkey was on the margins of the Middle East. You know, it, it had a buffer zone of sorts just inside the border, the northern parts of Syria. But by and large, Iran was the regional actor that dominated the politics of Iraq, Syria, Lebanon. There was a contiguous sphere of influence, but now that whole sphere of influence has collapsed. Yes, there's still Hezbollah, but it's not what it used to be. The Assad regime is gone. You have a pro Turkish government in Damascus, which is a, you know, dominated by a Sunni group that has replaced the, the regime, the Alawite dominated regime of, of former President Bashar Al Assad, who was aligned with Iran. The Turks, along with the Americans, are also trying to push into Iraq, which has long been dominated since the fall of Saddam. Iran has been dominating Iraq as sort of the one outside player with the disproportionate amount of influence. And we're seeing a pushback by an American Turkish tag team there. So Iranians are looking at all of this and saying this isn't good and our situation is very fragile. So I mean, let's just play this out at least, at the very least. Now what it means is that if the Iranians want to strike at Saudi Arabia or, or even, let's say close allies of Saudi Arabia like Bahrain and Kuwait, they have to factor in this new reality into their calculus that what if the Saudis call upon their friends and then what, and I know that from talking to sources on the Pakistani side is that they've been telling the Iranians, look, we don't want to fight, take the deal that the Americans are offering you and save everybody in the region, including yourself, a lot of problems. And don't hit Saudi Arabia. You know, we're allies with them. We, we will. Don't put us in a position where we have to take, you know, where we have to jump into the fray. We're forced to take that action. You don't want it, we don't want it. So the Iranians have been getting this message, and now with the addition of the Turks. So you ask this question, you know, can Iran fight on all fronts? Obviously not. And I think the same message is going out to the Houthis. And the Houthis aren't like the Hezbollah of Yemen. They're an ally of Iran, but

they're not the traditional proxy. They're an independent actor who decides when and where it's in its interest to cooperate, collaborate, coordinate with Iran. This is in sharp contrast with the command style relationship between the Iranians and the Iraqi Shia groups and the groups like Hezbollah. So this is a very complicated picture that is emerging. So, yes, you know, all things being equal, not that the Americans have left, but it's. The Iranians have long wanted the United States, you know, to disembark from the region, but not in this way, you know, not where, you know, Iran, you know, on its way out. The United States, you know, acts like a demolition actor and damages Iran through this war. So in a way, the Americans are gone, but now you have to deal with a new architecture that's emerging and there's still Israel out there and it's going to be there. And so Iranians have too many actors that they need to deal with. And, and their problem is they're out of friends. They have no friends. The only friend, state actor friend that they had was the Syrian regime of former President Assad. And since 2011, Assad was heavily dependent on the Iranians. So it's not like they, it was a regime or a state actor. It was, you know, the, the regime had become sort of a vassal of the Iranians. So in other words, the Iranians only have non state actors that they can lean on. And those days are also, you know, the, the heyday of that relationship or that arrangement is long gone as well. Hezbollah has been weakened. Hamas has been severely crippled. Assad regime is gone. The Shiite militias are now increasingly divided inside Iraq. And the Houthis say, look, you know, whatever happens to Iran, we can't control. But regardless, if we can benefit from this, we'll act if we can't benefit from it, then we don't want to go down with Iran. So they, in other words, they have a veto over how much they want to participate and when and where.

Christian Smith: Well, just to continue the sort of playing this out, as you say, Cameron, for now and for the foreseeable, Iran is in a fairly weak position, putting to one side the questions of the straightforward moves and the current conflict there with the US but more broadly, its position is significantly weakened now. But it strikes me as not in the current regime's nature to decide, okay, well, let's just be a normal country and not try and have these influences around the region and do the things it has been doing over the previous decades. At some point, it may return to some form of not being at war with the US I suppose, to put it that way, from the perspective of Saudi and Turkey, then how do you stop Iran

returning to having the sort of influence it's had in the past? Is this about containment?

George Friedman: In many ways, it's certainly doing that. We have to understand that what Iran wants to do is not necessarily what Iran can do. They launched into this war, and we should remember that there were thousands of people killed in an uprising just before the war. Therefore, we should not assume that the solidarity of the Iranian people about this, like most countries, there are divisions. We should also not assume that the governing force, irgc, is fully united. There's one thing to govern a country and take it in its control. It's another thing to be shattered in a war and then losing all control of the country. So in other words, if you're sitting in the irgc, you're sitting in the Iranian government, you take a look around what just happened, you not only have the greatest power in the world at war with you, you have three of your most powerful neighbors looking at you saying, hit us, you hit all of us, and so on. So when they look at this evolution, their position is difficult politically as well, I tend to believe, because they have maneuvered themselves into what is fundamentally a potentially disastrous position at war with the United States simultaneously facing this alliance. Okay, so there, I suspect, are likely factions that are developing that even if they're sharing the ideology of the regime thinks there is a great danger here to their future, of the country's future as well, and wanting to start thinking about how to back out of this before. The only problem was the United States, a president who had gotten caught in the war, that he didn't intend to last this long, but who had promised not to go and likely as America did in Vietnam or Iraq and Afghanistan. We hold out long enough, they leave. Turkey, Saudi Arabia and Pakistan have nowhere else to go. They're there permanently. So what I would suspect is also happening inside of Iran is as there normally is in most countries, divisions. There were some who welcomed the aggressive actions of Iran, welcomed that they were supporting all these non state actors and so on gaining power. There are also those who may have said, be very careful we don't overstep the bonds because the forces out there are many. This is in a way the worst case scenario for them. This is no longer the US and Iran facing each other. It also is a potential action by nations that are some very friendly to the United States, like Saudi Arabia, some a little cooler like Turkey, but still part of the United States. With the United States now having promised to sell advanced aircraft to Turkey and so on, and a member of NATO along with it. So if you take a look at this, I

would normally expect factions to emerge. And given that they have an internal police that is normally the ones to handle internal factions, these would be very high level factions emerging. So I think at this time it's not only we who are sitting down and discussing this matter, but the Iranian government are parts of it, trying to figure out exactly what to do. What they hope happens is this alliance doesn't really work. There's an alignment in statement, but not in fact. But they have to test that to find it out. And given the interests of these three countries, it's quite likely that it's a real alignment. So in any way they move, they take massive risks. At this point, the lowest risk is to visit accommodation with the United States, pull back a little, maintain their ideology in the country, but go easy on their force projection. Will they do that? Well, can they live a long time with this alliance structure all around it? And this is what makes this so important, that it is not just an alliance. It's an alliance of three countries on Iran's, near Iran's borders, okay? Surrounding it on all sides. One of them, the nuclear power, which is Pakistan and others with significant resources, Saudi Arabia and Turkey with a massive army. This will make them very nervous. So I think the next step in this evolution is internal inside of Iran. While these countries sit and organize themselves in the zoo alliance, the Iranians inside are going to be making fundamental decisions and the power of the IRGC over itself and the rest of the country may be challenged. Remember, there's a secular army also present in Iran, okay? And that army itself may or may not want to have a different role. So the thing to look at now is not just what Iran says about this alliance, nor anything it says about the United States or anything else, but what they're saying to each other, which we can't hear. But certainly there are recriminations beginning to float all around Iran.

Christian Smith: Want actionable insight from geopolitical futures? Introducing Geoeconomic Lens, helping you understand not just what is happening, but but how global power dynamics shape economic stability, dependency and opportunity. I'm joined by the brains behind Geoeconomic Lens, Antonia Kolibasnu. Antonia, the August issue of Geoeconomic Lens is out now. Just give us a brief rundown. What can subscribers expect in this month's edition?

D: Sure. Thank you for inviting me. Indeed, our Lens report is out. And well, we are going with our model for geoeconomics, which basically says that the global system as we know it is under transition and restructuring, and so the global

economy itself is also restructuring. The best case for this, at least this month, is deep dive into the geography of data centers. So the main feature of this month's report is focusing on how AI competition actually depends on the geography of things and how infrastructure is also building up as a new geography where interdependencies are a bit different than what we are used to think of when we thought about technologies and generally about structures of commerce and investment. So basically we assess how political capital is important, but also how energy, for instance, is important.

Christian Smith: And Antonio, you write as well in this edition about sanctions and particularly about why we're very much used to sanctions now, particularly since the start of the war in Ukraine, and sanctions on Iran over the years now. But you're writing about them and the fact that they're anything but routine.

D: Yes, especially now I think that this is the last time and the last batch of sanctions that we are going to see on Russia, at least sanctions in the sense of commercial and investment related sanctions. Of course, we may see some political sanctions coming along after these, but the reason that I have written about this under geoeconomic transformations is the very fact that we are seeing now the US and the EU basically lined up to pressure Russia and to make Russia really stop the war. And I say that this is the last batch of sanctions also because they are so tough that beyond these, I think we are going to see the sanctions hurting the Western businesses. They are already there in the sense that there is a lot of operational pain that businesses need to push themselves through as they deal with the sanctions. But beyond what we currently see and the current package that the EU has pushed forward. But also in the discussions that we are seeing in the US we are likely going towards the limit of what we can do in the sense of economic sanctions. Now, obviously, we are also seeing the response and while our report is out, we are also going to write in the monthly briefing the Russian response has been to legalize cryptocurrencies and the use of cryptocurrencies in international transactions. So that pretty much says that Russia is understanding what is coming from the US Side and what is coming from the eu and we will see how much time Russia is going to go with this and kind of push the negotiations a moment later in a sense. So this could be an indicator that the war is going to at least stop ceasefire agreement if not end.

Christian Smith: Antonia, thank you. You can read that piece and of course, much, much more from geoeconomic lens. Just go to geopoliticalfutures.com Lens to sign up. Now back to the podcast. Let's look beyond Iran and beyond the Middle east in many ways now as well. Particularly we've touched on the United States reaction to this and the fact that this fits quite nicely into their desire to withdraw from parts of the world that they don't want to be in. What about India? India and Pakistan in particular, of course, have a long rivalry, to put it that way. It's fairly frequent that the two countries have different forms of skirmishes. It wasn't that long ago that they were both bombing each other last year, I believe. Doesn't that feel like a long time ago? Now, Kamaran, coming to you first on this. I mean, India is likely to be a bit worried about this, aren't they?

C: Yes. And you can see, you know, from the official statement from New Delhi is that the government is examining or studying this new development. And that's know what they're telling the press when the press says, hey, what do you think about what just happened? And so that tells me that they, you know, haven't figured this one out and not un you know, not surprisingly, because this is something that they weren't expecting. Plus they're already dealing with and they don't know how to deal with an America that is reaching an accommodation or is trying to reach an accommodation with China because an American Chinese accommodation means for all practical purposes that the old, for many, many years strategy of the United States to align with India to counter China is not what it used to be. I'm not saying it's gone, but I'm saying is that it's not as important as it used to be. And with it the importance of the Indo American relationship. And so, and I suspect, you know, that Trump got tough on India with the tariffs because, you know, there was no longer that need. And he had room to maneuver so he could press the Indians on trade, which he would normally not do if he was still going to go and confront China. But now that the strategy has shifted and the relationship as we saw, Chris, you Talked about the 87 hour war from last May, May of 2025 between India and Pakistan. It led to a break in relations between New Delhi and, or at least even if it wasn't the full break, but there was a crisis in Indian American relations because the Indians were hoping that the Americans would press the Pakistanis on the issue of support for Islamist militant groups that stage attacks in India. And in this case the one from April 2025 that led to India retaliating across the border in that unprecedented manner. But the United States said, look, you know, we're not taking sides here and we

actually need you to not fight with each other. The president is trying to end the war in Ukraine and at that time the issue was Gaza and the Lebanon war. And so the United States is trying to do that. And so this is not the right time. That already created a friction, if you will, between New Delhi and Washington. So now you have on top of that, that's the context in which this is taking place. And then it's no secret, at least the Indians have not made it secret that they see the behavior of Turkey as well as Azerbaijan because of both countries relationship with Pakistan as, you know, hostile, as potentially hostile. And so if you have Turkey and now Saudi and Pakistan coming to an alliance that is in keeping with what the United States actually wants, then that makes it even worse for India. So the Indians have to figure this one out. Now the, the issue of Iran is India is not a friend of this regime by any stretch of the imagination. But Iran has been, you know, the Indian hope has been that, you know, if things can settle between the US and, and the Iranians, then there is great geoeconomic benefits to India. You know, connectivity, that corridor running through the full length of Iran into Central Asia and connecting with Russia, the international north south transportation corridor and whatnot. And so that's not happening as well because of the war. And India had a really good relationship with, you know, the Arab states, the Gulf, Arab states, Saudi, UAE and others. And so to the point where it not too long ago the word on the street, I mean the analytical street was that, you know, the Indians have You know, edged out Pakistan even from its closest allies, meaning the Gulf Arab states. Now all of that has, is now, you know, is in reverse mode. And so it's no longer the case under the Biden White House. You had the project called the India Middle East Europe Corridor imec, and that was going to go from India through the Arabian Peninsula, Saudi Arabia, through Jordan, Israel and then on to Greece. All of that has also been appended. So the Indians are looking at this chessboard that's all around them. And not to mention, you know, we can go into the details about the Chinese Pakistani relationship and they're looking at this and saying, you know, this is bad and, you know, how do we, how do we deal with this? I suspect that it'll be a while before they can come up with a strategy.

George Friedman: This also involves another dimension, the Ukraine war. Turkey borders on the Black Sea. The Black Sea is a very important area for it, for trading with Europe. The war in Ukraine is now spilled over into the Black Sea. Both the Russians and the Ukrainians are on the other side of the Black Sea and

it's almost impossible to transport goods. This is affecting Turkey profoundly. I'm not saying these other two nations will engage in this thing, but given that they have in a way the Turkish back covered, Turkey may have to do something there too. So when we take a look at it, it affects the Chinese relationship because China is a lie of Pakistan. It affects the relationship of the United States to China in some good ways and bad ways. It affects India. This also affects Ukraine and therefore Europe as well, given that Turkey is also a European power in a way in NATO. So this has a global effect or at least throughout the Eastern hemisphere and certainly to the Americans as well. So this is a major event if it holds together. And I think these three countries are mature enough and their government stable enough not to have entered into this with the idea of stepping back. I think the three governments looked at it, said we need to do this and we're going to need to do this for a while. So I don't think it's something that's going to be fragile. I think this is going to evolve into something very significant because all these countries have various different ways and need for this alliance. Certainly Russia hitting in some way or Ukraine accidentally hitting Turkey with the doctrine an attack on one is the attack on all creates all sorts of various problems that others wouldn't want to risk. I think it creates a greater security blanket for all these countries.

Christian Smith: And George, just on the Indian angle, I mean, we Were not long ago on this podcast talking about India's sort of attempts to expand its alliance and friendship networks with visits to visits to Australia and New Zealand. How does that play into this then? Are we seeing a new emergence, I suppose, of these different alliance structures?

George Friedman: Yes, of course, because the American desire to withdraw from the Eastern hemisphere, focus on the Western Hemisphere, which is a written doctrine of this administration and a very logical thing to do, means that it does not want to have responsibility for China in the Pacific. Now we're seeing Japan developing a major military capability in alliance with Australia, alliance with India in a way, and other countries align around China borders. We should remember that in September there's a summit meeting scheduled between President Trump and President Xi of China. There had been one summit already in China. There's been a great deal of discussion between American and Chinese minister levels, policy levels and so on, talking about how they might reach accommodation. So when we take a look at this, we can see that the United States

wants to pull back, not have a hostile relationship with China. China depends on the United States, as I said many times before, because it can't consume what it produces and the United States is its biggest export partner. And so when you take a look at all of these things, getting the pressure of the Middle east off of the shoulders of the United States and place it among these three countries is of advantage to these three countries in many ways, as well as to the United States. But certainly India is becoming very much rooted in the Indo Pacific region with relations with New Zealand, Australia, Vietnam and up to Japan. So this is an other alliance structure emerging from the reduction of the American presence.

C: George, I have a question for you. Coming back to the Middle east, we haven't talked about what this means for Israel, and a lot of people are asking this question. I mean, I personally run into people who are constantly asking me. So we understand the Iran angle, we understand the American desire to see this architecture because it wants to retrench. But relations between each of these three countries aren't nice with Israel. So how does this work? How does this. How given everything that's happening in Lebanon, in Syria, in the Palestinian territories, et cetera, et cetera.

George Friedman: So first, Turkey and Israel have never fought a war against each other. Saudi Arabia has had very friendly, quiet relationships with Israel. Okay. Pakistan is too far away to count. So these are countries, unlike other countries, that do not represent necessarily a threat to Israel, but they offer a benefit to Israel that's tremendous. They want the non state actors supported by Iran out of the way. Now Remember that the Israeli problem began with Hamas, a non state actor. Okay. And when you take a look at this alliance, that is offensive, not offensive. You look at the history of relation with Turkey and Israel, which has not been warm, but never really hostile and practiced rarely in that way, Saudi Arabia's relationship with Israel, it means something that may potentially be very good for Israel in the sense if these nations combine to break the non state actors, Hezbollah and everything else, Israel becomes safe from what it primarily fears. At the same time, it marginalizes Israel in the sense that Israel is no longer a major player deep into the Middle East. It is a small country, very narrow, 71 miles at its widest part, a very creative and productive country, but its influence declines. This will particularly be the case as I believe the next step is Egypt being included. Egypt and Israel have a relationship, a treaty. A treaty not to have

wars. Egypt has fought a war back in 73, but since then that hasn't happened. Egypt has not played in this game. So when you take a look at the map, what is Israel's major problem? Non state actors. When you take a look at the primary force behind that, there are others, but Iran is certainly the key. Okay, so when you take a look at this, what happens here is that the Israeli question becomes much less important to the region. This is a power that the Israelis do not want to take on. They certainly don't want it to fight Turkey, Saudi Arabia, which is pretty much friendly to it, and Pakistan. So what Israel becomes is a very small country in a very new region with a different structure, safer, but much less the center of attention as to what's happening. Marginalized that, as I see it, it will. These countries there have far better things to do than attack Israel and far more interest in getting rid of these Houthis and everything else that have come up. So I would say what happens is, firstly, a safer Israel, but a far

C: less important one to push back on that a little bit. We know for a fact that many within Israel, within its security establishment, within its policy community, even people, you know, like Naftali Bennett, who's running for prime minister in the upcoming elections in late October, they have all said that, yes, Iran is no longer a threat to us, at least not in the way it was before this war. But Turkey is the new threat for us. And I'm trying to understand what they mean by that. And one thing that does come to mind is that if Turkish influence, along with, you know, aligned with Saudi, this grows and this consolidates, especially in the case of the pro Turkish government in Syria, then that would mean that Turkey at a future time can basically influence Israeli behavior with regards to the Palestinians. And so that, I think is on the minds of Israeli strategists.

George Friedman: Sure. And there's nothing they can do about it. They're worried about it. Okay. But they have never engaged Turkey in any serious way. Turkey has never engaged them. One of the problems the Israelis has is realizing that they are in the Middle East. And being in the Middle east, there are going to be countries that are more powerful than they. Now. Israel has been used to being in a position where its military power is so great that no one in the region could challenge them or would challenge them, or when they tried to challenge them, were destroyed. 2073 war. Okay. In this case, you have a country emerging, Turkey with substantial power. Now the Israelis play the worst case scenario. Their best strategy is not to engage Turkey in hostile relations. Israel's problem

has been such that it's always tried to be preemptive to prepare for the worst and so on and so forth. In the case of Turkey, it has to have a different strategy. Does it not have a military capability to attack Turkey and actually win? Firstly, there's geography involved, and secondly, the fact that the Turks are quite powerful themselves. The Turks also are not friends of Hezbollah and so on and so forth. They have their own issues. So this is where the internal Israeli policy has to change, regardless of whether they wanted to or not. Necessity makes it imperative, if not to join them. And their biggest sponsor, I think, will be Saudi Arabia, which has always had a quiet relation with Israel. And certainly the Pakistanis are not that concerned about it. They're far away. You know what I do. As for Turkey, it's going to be too powerful a nation. It already is for Israel to. To be able to defend itself against its power. So it has to be accommodated to. So in other words, I look at the Israeli situation as declining not only importance to the region. Okay. But really Israel playing a very different role. Because while it could be aggressive against Lebanon, it could be aggressive against Syria, it could take on Egypt. Taking on Turkey is a very different matter. So the policy of Israel is one thing. The reality of Israel is something else. Whether it's beneficial to Israel or not, they're going to have to change their behavior not just in the face of this alliance, but in the face of an emerging Turkey.

C: A follow up on that. So it seems to me that whatever the Trump White House has been doing in terms of burden sharing and burden shifting has worked in the form of the Turks and the Saudis and the Pakistanis coming together. Now, what is the American position? Because Iran is going to be an unknown for a very long time to come. So Iran is not in this mix and probably won't be. But how does, because Israel is an ally of the United States, these countries are allies of the United States. How does the United States get these two Israel and this alliance to work together?

George Friedman: That's Israel's problem. So one of the things we've been seeing at this point from Trump for various reasons, is telling Israel, okay, you want to do these things like, we don't want you to be invading Lebanon at this point in this way. So what has happened here is that the American relationship to Israel, which was critical during the Cold War because Egypt, Syria, these are all Soviet allies, and that was there, that relationship with Israel is obsolete. It is no longer necessary for the United States. At the same time, there's cultural issues

and so on and so forth that to some extent tie them with them. But the idea that the United States will value Israel more than Turkey, for example, is probably likely, especially because the United States really wants to withdraw from this whole thing and not be involved. We always have to remember that the relationship between the US And Israel was essential to the United States during the Cold War because it blocked Soviet power. At this point, it's an elective affinity, as they say, and it becomes elective and the United States is going to be leaving to Israel to restructure itself.

Christian Smith: George and Kamaran, I think it's probably a good point to end there. Thank you very much for both being on this podcast. Thank you to the audience. I hope you enjoyed this extended podcast. We'll be back again soon with another podcast from Geopolitical Futures. But until then, you take care. Bye bye. You can find all of our expert geopolitical analysis@geopolitical futures.com.