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The Middle East at a Strategic Crossroad

Introduction

The military developments unfolding across the Middle East in 2026 cannot be understood simply as a confrontation between opposing military forces or as a conflict confined to the borders of the countries directly involved. The present crisis has become a test of the regional security order, the credibility of defence commitments, the capacity to protect critical infrastructure, and the security of the maritime routes upon which global energy supplies and international trade depend.

Saudi Arabia stands at the centre of these developments. The Kingdom possesses substantial financial resources, considerable oil production and export capacity, and significant political influence. Yet attacks on energy infrastructure, airports and maritime routes have exposed a fundamental strategic contradiction: economic power alone cannot guarantee national security. Meanwhile, the intensification of the war in Yemen and the growing threats to international shipping have transformed what was once primarily a domestic and regional conflict into a crisis with potentially far-reaching global consequences.

The signing of the Mecca Joint Defence Pact by Saudi Arabia, Pakistan and Türkiye on 7 August 2026, followed by steps towards implementing its commitments in October, represents a significant development in the region's evolving security architecture. According to Al Jazeera, Pakistan has stated that

an attack on any one of the signatories would be regarded as an attack on all three, reflecting the pact's declared objective of strengthening collective deterrence (Al Jazeera, 2026a).

The central question, however, is whether this agreement can genuinely enhance Saudi Arabia's security, contain the war and reduce the risk of a wider energy crisis—or whether uncertainty surrounding its commitments could instead contribute to further escalation.

This article examines Saudi Arabia's strategic vulnerabilities, the respective roles of Pakistan and Türkiye, the changing dynamics of the war in Yemen, and the significance of the Strait of Hormuz and Bab al-Mandab. It then assesses the potential implications of the crisis for regional security and the global economy.

1. Saudi Arabia's Economic Power, the Mecca Defence Pact, and the Limits of Deterrence

Saudi Arabia's strategic vulnerabilities

Saudi Arabia is one of the principal actors in the global oil market. Its security, however, depends on considerably more than its production capacity or financial resources. Oil extraction and processing facilities, transmission pipelines, export terminals, airports and maritime routes form an interconnected economic and security system. Damage to any one of these components can generate substantial economic and military costs.

The United States Energy Information Administration's report of 6 October 2026 indicates that the spot price of Brent crude averaged US\$114 per barrel in September, US\$23 higher than in August. The increase followed escalating attacks on energy infrastructure and oil tankers in the Middle East. According to the same report, an attack on Saudi Arabia's East–West Pipeline, which transports oil towards the Red Sea port of Yanbu and provides an alternative to the Strait of Hormuz, temporarily disrupted the flow of oil. Before the attacks, the pipeline had been carrying more than five million barrels per day. The agency forecast an average Brent price of approximately US\$105 per barrel for the fourth quarter of 2026 (EIA, 2026).

These figures highlight two important considerations. First, even without a complete halt to oil exports, warfare can place considerable pressure on the global economy through higher insurance and shipping costs, concerns about supply shortages and increased market volatility. Second, alternative export routes do not

provide complete protection. The East–West Pipeline, which is strategically important because it reduces Saudi Arabia’s dependence on the Strait of Hormuz, has itself become vulnerable to attack.

Saudi Arabia’s vulnerability should therefore not be reduced to the ability of the Houthis to strike a particular facility. The more consequential problem is the possibility of repeated attacks, the difficulty of protecting an extensive network of critical infrastructure simultaneously, and the cumulative effects of persistent threats on trade, investment and national development plans.

A fundamental distinction must be drawn between the capacity to inflict damage and the capacity to achieve strategic victory. A successful strike against an installation does not, in itself, amount to the strategic defeat of the targeted state. Equally, intercepting missiles and protecting infrastructure does not necessarily resolve the underlying conflict. Strategic outcomes must instead be assessed in terms of sustained security, the costs of warfare, the credibility of deterrence and the prospects for a durable political settlement.

The Mecca Defence Pact: From political declaration to operational deterrence

Saudi Arabia, Pakistan and Türkiye signed the Mecca Joint Defence Pact on 7 August 2026. According to Al Jazeera, the agreement is based on the principle of collective defence, with Pakistan stating that an attack on one signatory would be treated as an attack on all three. Rayed Krimly, Saudi Arabia’s Deputy Minister for Public Diplomacy, has also maintained that the agreement is not intended to create a military bloc or a sectarian alliance, but rather to strengthen sustainable capabilities and greater strategic self-reliance (Al Jazeera, 2026a).

Nevertheless, the substance of a defence pact is determined not merely by its initial declarations but by its operational arrangements. What constitutes an attack serious enough to activate collective-defence commitments? Are those commitments limited to protecting member states’ territories and critical infrastructure, or could they extend to offensive operations on the territory of a third country? How are decisions concerning troop deployments to be made? And can a member decline to participate in a particular operation if it disagrees with the objectives or the level of risk involved?

On 5 October, the pact’s strategic committee in Riyadh reportedly emphasised the immediate implementation of collective-defence commitments and the deployment of agreed military personnel and capabilities. However, the joint

statement did not specify troop numbers, precise mission objectives, command arrangements or the duration of any deployment (Hussain, 2026; Reuters, 2026a).

In an Al Jazeera analysis, Abid Hussain quotes Dania Thafer, executive director of the Gulf International Forum, as observing:

“Saudi Arabia is trying to turn the Mecca pact from a political declaration into a deterrent”.

The distinction is crucial. There is a substantial difference between announcing political solidarity and establishing credible deterrence. A pact can be effective only if potential adversaries believe that its members possess both the capacity to respond and the political resolve to do so. If obligations remain ambiguous, or if members disagree over the nature of military operations and their willingness to accept risk, the agreement could encourage miscalculation rather than contain the crisis.

For this reason, describing the Mecca Pact as an “Islamic NATO” or a “Middle Eastern NATO” would be premature. A shared commitment to collective defence does not, by itself, establish structural equivalence. Such a comparison would require a detailed examination of joint command arrangements, legal obligations, operational coordination, funding mechanisms and collective decision-making procedures.

Until these elements are clearly established, it is more accurate to describe the agreement as a trilateral defence arrangement whose operational capabilities and limitations are still taking shape.

Pakistan and Türkiye: Defence commitments with different constraints

Pakistan is not a new military partner of Saudi Arabia. The two countries have maintained defence cooperation, military training arrangements and a history of Pakistani military involvement in Saudi Arabia over several decades. They also signed a bilateral defence agreement in September 2025 under which aggression against either country would be regarded as aggression against both. The Mecca Pact should therefore be understood as an extension of an existing defence relationship rather than an entirely new strategic alignment.

Pakistan nevertheless faces a significant dilemma. Islamabad seeks to honour its defence commitments to Saudi Arabia while avoiding entanglement in a prolonged and costly war in Yemen. A Reuters report published on 8 October

2026 noted that the decision to deploy additional Pakistani personnel had been announced without a publicly reported parliamentary vote. This contrasts with the position taken by Pakistan's parliament in 2015, when it recommended neutrality in the Saudi-led war in Yemen while affirming Pakistan's commitment to defending Saudi territory and the holy sites (Reuters, 2026b).

This contrast raises important questions about civilian oversight of military decision-making and the limits of Pakistan's potential involvement. Furthermore, Pakistan's possession of nuclear weapons does not automatically imply an extended nuclear guarantee for a treaty partner. Such a conclusion cannot be justified without clear evidence of formal commitments and the relevant military doctrine.

Türkiye, meanwhile, possesses significant capabilities in defence manufacturing, unmanned aerial systems, electronic warfare and technical support. Ankara has nevertheless sought to distinguish assistance to Saudi Arabia from direct participation in offensive operations in Yemen.

On 8 October, Turkish Foreign Minister Hakan Fidan told Reuters that Türkiye was considering Saudi Arabia's defence requirements. He emphasised:

“This is not an offensive agreement. Turkey will not send troops to another country to carry out attacks on its territory”.

According to the same report, the options under consideration included air defence, electronic warfare and technical support. At the time, parliamentary approval of the pact in Türkiye had not yet been completed (Reuters, 2026c).

Strategically, this approach would allow Türkiye to strengthen its position in regional security arrangements without necessarily assuming responsibility for a prolonged ground war. Yet the wider Saudi military campaign in Yemen becomes, the more difficult it may be for Ankara to maintain a clear distinction between defensive assistance and participation in offensive operations.

For both Pakistan and Türkiye, the decisive issue is therefore how far their support will extend—and under what circumstances defensive assistance might become direct involvement in combat operations.

2. Yemen, the Houthi Movement, and the Limits of Regional Military Power

Yemen has once again become a major arena of regional confrontation, with consequences extending well beyond its borders. The Houthi movement, also

known as Ansar Allah, has controlled Sanaa and substantial parts of northwestern Yemen since 2014. Its rise was rooted in Yemen's internal political crisis and the breakdown of the country's transitional process, although its military capabilities and regional influence have also been strengthened by support from Iran. Iranian support, however, should not automatically be taken to mean that every Houthi decision is directed by Tehran. The movement has its own political agenda, domestic constituency and strategic calculations.

The conflict has entered a more dangerous phase following renewed fighting, advances by the Houthi movement towards the Bab al-Mandab Strait, and a fresh offensive by forces aligned with Yemen's internationally recognised government. According to Al Jazeera, the government's operation, announced under the name *Dawn of Yemen*, aims to recover territory held by the movement, potentially including Sanaa. Saudi Arabia has provided substantial aerial support, while the United States has reportedly contributed intelligence capabilities. Nevertheless, the military gains achieved so far remain limited, and the prospect of retaking territory held for more than a decade raises the risk of a prolonged and increasingly destructive war (Al-Shamahi, 2026).

The humanitarian consequences are already severe. The United Nations has reported that at least 46 civilians were killed and more than 130 injured in Yemen between August and early October, while the International Organization for Migration reported that more than 200,000 people had been displaced since fighting escalated in September. These figures illustrate the danger of renewed large-scale hostilities after the relative calm that followed the 2022 truce. As the UN Special Envoy for Yemen, Hans Grundberg, warned, the time to pursue political strategies is now if war is not to become Yemen's permanent reality (Al Jazeera, 2026a).

The escalation has also exposed the limitations and ambiguities of the Saudi-led regional strategy. On 10 October 2026, Saudi authorities reported that attacks attributed to the Houthi movement on King Khalid International Airport in Riyadh had killed at least 12 people and injured more than 300. The victims included Saudi citizens and foreign nationals. Airport operations were temporarily suspended, while the Saudi-led coalition condemned the attack as a war crime and threatened a forceful response. Houthi officials had warned that Saudi airports and airspace could be targeted amid the renewed military campaign. The attack and the subsequent Saudi-led airstrikes against Houthi-held areas have heightened fears of a wider regional confrontation (Al Jazeera, 2026b).

Attacks on civilian airports and other civilian infrastructure place civilian lives at unacceptable risk and require serious scrutiny under international humanitarian

law. The same legal and humanitarian standards must apply to all parties. The United Nations stressed that attacks against civilians and civilian infrastructure violate international law.

Yet this principle raises a fundamental question about the consistency and impartiality of the United Nations itself. When Saudi-led forces conducted extensive military operations against Houthi positions in Yemen using advanced weaponry, and when approximately 75,000 Palestinian men, women and children were reportedly killed in Gaza, critics questioned whether the international organisation had responded with the same urgency, determination and moral clarity. Such perceived double standards have seriously undermined confidence in the UN's authority and credibility. An organisation that invokes international law selectively risks becoming an instrument of political convenience rather than an impartial guardian of the principles it proclaims.

The credibility of an international institution rests not merely on its declared principles, but on their consistent, effective and non-discriminatory application to all parties involved in international conflicts. Examining the United Nations' responses to different international crises—including the claims concerning weapons of mass destruction in Iraq, allegations directed against Iran, and the conflicts in Yemen and Gaza—raises serious questions about the consistency of international scrutiny and the impartiality of international decision-making. Such disparities warrant rigorous examination rather than unquestioning acceptance.

The comparison with the League of Nations before the Second World War is therefore sobering: when an international institution repeatedly fails to translate its principles into consistent and effective action, its prestige, legitimacy and authority are progressively eroded.

The Saudi-Pakistani-Turkish Mecca Defence Pact, signed in August 2026 and brought into practical operation amid the latest escalation, adds another dimension to the crisis. Its stated purpose is collective defence, but the distinction between defending Saudi territory and supporting offensive military operations inside Yemen remains critical. As Abid Hussain's analysis for Al Jazeera explains, Pakistan has described its role as supportive and defensive, including reconnaissance, while the precise scale and operational responsibilities of the participating forces have not been fully disclosed. Türkiye's precise contribution has likewise remained unclear. Dania Thafer of the Gulf International Forum observed that Riyadh seeks to turn the pact from a political declaration into a credible deterrent (Hussain, 2026).

Yet deterrence alone cannot resolve Yemen's underlying political conflict. A strategy intended to protect Saudi territory could become a much wider campaign if its objectives expand to the defeat of the Houthi movement or the recapture of Sanaa. The movement retains substantial missile and drone capabilities, while Saudi Arabia and its partners possess considerable air power. This imbalance does not guarantee a decisive outcome; instead, it may prolong the conflict, increase civilian casualties and draw additional regional actors into the fighting. The central question is not simply which side possesses superior weaponry, but whether military pressure can produce a durable political settlement.

The strategic importance of the Bab al-Mandab Strait further raises the stakes. Together with the Strait of Hormuz, it is a critical passage for international shipping and energy supplies. Any sustained disruption could increase transport costs, intensify pressure on energy markets and undermine confidence in the security of maritime trade. Yemen's conflict is therefore inseparable from the wider regional crisis: a local military escalation can rapidly acquire global economic consequences.

Three broad outcomes remain possible. The first is negotiated containment, in which the parties accept limits on military operations and return to political talks. The second is a prolonged war of attrition, characterised by airstrikes, missile and drone attacks, territorial advances and repeated retaliation. The third is a wider regional confrontation in which the Mecca pact and other security arrangements draw additional states into the conflict. The second and third scenarios would carry particularly grave humanitarian and economic risks.

Ultimately, neither Saudi Arabia's military superiority nor the Houthi movement's capacity to retaliate can substitute for a political settlement that addresses Yemen's internal divisions and respects the rights and security of its population. Nor can international institutions restore their credibility merely by issuing statements: their principles must be applied consistently, regardless of the identity, alliances or strategic importance of those responsible. A lasting settlement requires restraint by all parties, protection of civilians, respect for international law and sustained negotiations. Without these elements, the pursuit of regional dominance risks deepening the very insecurity it claims to overcome.

3. Strategic Prospects and Conclusion

The current developments can be assessed through three broad scenarios. These are not predictions of inevitable outcomes; rather, they provide a framework for evaluating the possible consequences of political and military decisions.

Scenario One: Containment through negotiations and limited deterrence. Under this scenario, the Mecca Pact remains focused on protecting the territories and critical infrastructure of its members. The parties refrain from expanding offensive operations, while diplomatic channels are used to reduce tensions in Yemen and the wider region. Such an outcome could reduce the risk of further attacks and moderate volatility in energy markets, although it would not, by itself, resolve the underlying disputes.

Scenario Two: Prolonged attrition and an expanding proxy conflict. In this scenario, attacks and counterattacks continue, energy infrastructure and maritime routes remain intermittently threatened, and the Mecca Pact provides military and technical support without necessarily committing its members to a large-scale ground war. This could increase economic and military costs without producing a decisive victory for any party.

Scenario Three: Wider war and more direct involvement by the pact's members. If the defence of Saudi Arabia becomes inseparable from an extensive offensive campaign in Yemen, pressure on Pakistan and Türkiye could intensify, while tensions with Iran could escalate further. The Strait of Hormuz and Bab al-Mandab could then face greater disruption, transforming the regional crisis into a more serious shock to the global economy.

The Mecca Defence Pact should neither be dismissed in advance as ineffective nor portrayed, without examining its operational capabilities, as a guarantee of regional security. Its actual significance will depend on the clarity of its commitments, the quality of defensive coordination, the limits placed on military missions, the management of disagreements among its members and the preservation of diplomatic channels.

In Yemen, too, a sustainable strategy must connect Saudi Arabia's security concerns with Yemen's political realities, the humanitarian consequences of the war and the wider need to reduce regional tensions.

The central lesson of the present crisis is that deterrence without diplomacy can intensify military competition, just as diplomacy without credible defensive capabilities may fail to contain threats. A more durable regional order will require military preparedness, clearly defined commitments, protection of critical infrastructure and a credible political process to operate in concert.

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