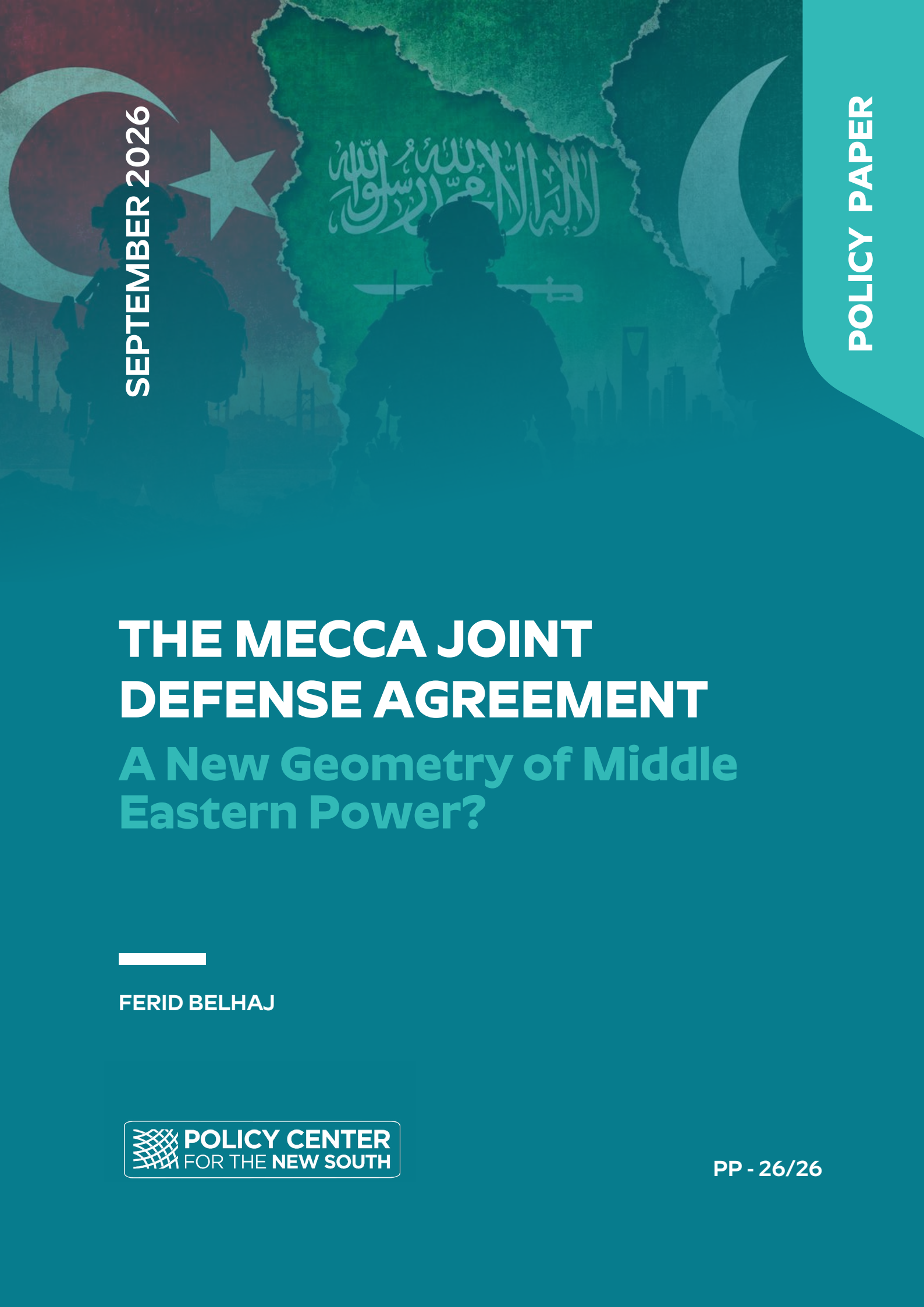




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POLICY PAPER

THE MECCA JOINT DEFENSE AGREEMENT

A New Geometry of Middle Eastern Power?

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On August 7, 2026, Saudi Arabia, Turkey, and Pakistan signed the Mecca Joint Defense Agreement, a collective-defense pact widely compared to NATO's Article 5. This essay argues that the comparison is misleading. Mecca borrows NATO's language of solidarity without yet possessing NATO's institutional machinery, and the Houthi offensive against Saudi Arabia in September 2026 provided an early and revealing test of what the agreement actually means in practice. Neither Pakistan nor Turkey automatically entered the fight on Saudi Arabia's behalf, and Washington, despite an initial reluctance to strike directly, remained indispensable through intelligence support and a major proposed F-35 sale. Drawing on realist alliance theory — Hans Morgenthau, Kenneth Waltz, Stephen Walt, Glenn Snyder, and Steven David — and on the precedent of the Central Treaty Organization (CENTO), the essay contends that the Middle East is not dividing into rival blocs but moving from hierarchy toward a looser, overlapping geometry of hedged partnerships, in which American exclusivity is eroding considerably faster than American primacy.

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INTRODUCTION

On August 7, 2026, Saudi Arabia, Turkey, and Pakistan signed the Mecca Joint Defence Agreement. Its collective-defense clause does more than echo the Washington Treaty of 1949: it adopts NATO's core logic, whereby an armed attack on one member is treated as an attack on all. Turkish Foreign Minister Hakan Fidan underlined the parallel by calling the commitment "technically similar" to Article 5. Yet the comparison also reveals the distance Mecca still has to travel. NATO's deterrent power rests not on Article 5 alone but on decades of integrated command, common planning, interoperability, and institutionalized cooperation — machinery that Mecca does not yet possess, even as Turkey's Ministry of National Defence has outlined plans to build toward it through joint land, naval, and air exercises and cooperation in air defense, unmanned systems, electronic warfare, artificial intelligence, and joint defense production (Reuters 2026a; North Atlantic Treaty Organization 2026a).

A grand narrative assembled itself almost overnight: a "Muslim NATO," a Sunni bloc against Iran, a coalition against Israel, even a Pakistani nuclear umbrella over the Peninsula. Steven Cook, a senior fellow at the Council on Foreign Relations, offered a more careful version, suggesting that Mecca signaled the erosion of the American-led order and the possible rise of an alternative security architecture alongside the one built around the Abraham Accords (Cook 2026). There is truth in this diagnosis: the order is changing, and Riyadh has every reason to diversify after infrastructure strikes and threats to its shipping lanes. But to conclude that one bloc is displacing another mistakes addition for substitution — and the weeks following the signature offered an unusually direct test of that claim.

When the Houthis intensified attacks on Saudi cities and energy infrastructure in September, the language of collective defense confronted its price. Pakistan condemned the attacks and urged Iranian restraint, yet stated on September 10 that no military response under Mecca was then under discussion, while adding that it would act under the agreement "when time comes" (Reuters 2026b). Turkey likewise condemned the attempted drone strike toward Mecca and reaffirmed Saudi sovereignty, but initially stopped short of announcing direct intervention (Republic of Türkiye, Ministry of Foreign Affairs 2026). Neither country repudiated the agreement, but neither treated "an attack on one" as automatically requiring armed force. For Riyadh the episode raised the question every alliance eventually faces: what, precisely, has been promised once the shooting starts?

The more instructive fact about Mecca, in other words, is that none of the three states abandoned its older relationships to join the new one. Turkey remains in NATO; Saudi Arabia remains embedded in American security architecture even as it deepens ties with China; Pakistan joins Mecca without loosening its bond with Beijing. Nothing is simply being replaced — relationships are being layered. This is the structural fact of the new Middle East: not a shift from one hierarchy to a rival hierarchy, but a shift from hierarchy toward geometry.

AGAINST WHOM?

Realism has never trusted the vocabulary states use to describe their own friendships. Hans Morgenthau, the founding theorist of postwar realism, insisted that foreign policy must be read through interest and power rather than solidarity (Morgenthau 1948). Kenneth Waltz, writing a generation later as the founder of structural, or "neorealist," theory, gave that intuition structural form: in an anarchic system, alliances are instruments of survival, not expressions of friendship (Waltz 1979). Stephen Walt sharpened the point further with his balance-of-threat theory: states balance not against raw power but against whichever state they perceive as most threatening, and that perception is shaped by four factors — a state's aggregate capability, its geographic proximity, its offensive military power, and the aggressiveness of its intentions (Walt 1987). That distinction does much of the analytical work here. Pakistan's threat perception remains dominated by India; Turkey's horizon includes Russia, Syria, the Kurds, and the eastern Mediterranean; Saudi Arabia's map centers on Iran, Yemen, and the reliability of outside protection. The three maps overlap without sharing a common hierarchy of threat — and Mecca, unlike NATO during the Cold War, has no equivalent clarity about what it is chiefly meant to deter. That ambiguity is a structural necessity: naming a single enemy would force each of the three signatories to publicly rank threats it would rather leave unstated — Turkey its relationship with Russia, Pakistan its border with Iran, Saudi Arabia its own diplomatic opening to Tehran — and so expose how differently the three members actually rank their dangers.

A STATEMENT WITHOUT OPERATIONAL CREDIBILITY

The comparison with Article 5 deserves scrutiny. Even NATO's Article 5 does not compel every member to declare war; each ally undertakes to assist by taking "such action as it deems necessary," which may or may not include armed force (North Atlantic Treaty Organization 2026b). NATO's credibility rests on what was built beneath that sentence — integrated command, standardized procedures, forward deployments, and nuclear deterrence, the product of more than seven decades of institution-building (North Atlantic Treaty Organization 1991, 2026b). Mecca has the sentence; it is only beginning to construct the machinery. There has been genuine progress: the inaugural Strategic Political and Defence Committee, convened in Istanbul on August 31, agreed on a permanent secretariat in Saudi Arabia and on strengthening defense-industrial cooperation, describing its aim as ensuring the "credibility and effectiveness" of collective deterrence — language that itself concedes credibility is still to be built (Ministry of Foreign Affairs of Pakistan 2026).

The three military ecosystems involved are, moreover, quite different: Turkish forces operate within NATO structures alongside a sophisticated domestic defense industry; Saudi Arabia depends heavily on American and European platforms; Pakistan's ecosystem is increasingly intertwined with China's. Cooperation among three such systems is feasible; integration is another matter entirely. Who commands a joint operation? Whose intelligence is authoritative? Does a drone strike on an oil installation trigger collective defense as a conventional attack would? These questions matter far more than any analogy to Brussels.

THE FIRST STRESS TEST: THE HOUTHIS

The renewed Houthi offensive gave Mecca its first real test. Houthi forces advanced along Yemen's Red Sea axis, threatened the Bab el-Mandeb, and intensified missile and drone attacks on Saudi territory, exposing the vulnerability of the kingdom's energy-export geography (Reuters 2026d, 2026e, 2026i). This episode offered the first real-world test of what the collective-defense clause would mean in practice, well before any such machinery existed. The initial responses exposed precisely the ambiguity realism would predict: Pakistan pressed Iran over the Houthis' behavior but confirmed that no military response under Mecca was under discussion; Turkey emphasized de-escalation over combat participation (Reuters 2026b; Republic of Türkiye, Ministry of Foreign Affairs 2026). Ankara later went further, with Foreign Minister Fidan stating that Turkey stood ready to help meet Saudi military requirements under the pact — evidence that alliance commitments are not triggered automatically but are negotiated in stages, moving from declaratory solidarity, to technical assistance, to possible operational support, only as circumstances and interests evolve (Reuters 2026h). Riyadh, for its part, did not publicly show displeasure nor accused either partner of failing to honor the agreement. That restraint is itself informative: it suggests both that the crisis had not yet reached the threshold at which the collective-defense clause would be invoked, and that Riyadh had every diplomatic incentive to preserve the appearance of solidarity so soon after launching the pact it had championed.

Strategically, though, the episode matters greatly. It shows Mecca already operating within what Glenn Snyder called the alliance security dilemma: allies want commitments strong enough to reduce the danger of abandonment but flexible enough to reduce the danger of entrapment (Snyder 1984, 1997). Riyadh wants credible partners; Islamabad wants enough ambiguity to avoid confrontation with Iran; Ankara wants regional weight without sacrificing NATO or its own room for maneuver. Each therefore has an incentive to want the agreement more binding on the others than on itself — the ordinary politics of alliances, but a long way from NATO's institutional density.

CENTO'S GHOST

History has already run a version of this experiment. The Baghdad Pact of 1955, renamed CENTO after Iraq's 1958 withdrawal, linked Turkey, Pakistan, Iran, and Britain in a Cold War security belt along the Soviet Union's southern flank. It never became a Middle Eastern NATO, because its members did not perceive threats alike: Turkey looked toward Moscow, Pakistan toward India, and Islamabad repeatedly discovered that membership did not guarantee partners would fight its preferred wars (Yeşilbursa 2005). The lesson resurfaced in 2015, when Pakistan's parliament voted to remain neutral rather than join the Saudi-led intervention in Yemen, while still affirming support for Saudi territorial integrity (Reuters 2015). The September 2026 crisis repeats 2015 and shows that the underlying structural weakness has not disappeared for when solidarity becomes expensive, alliances tend to fizzle away.

THE THREE COUNTRIES COOPERATE, BUT THEY DO NOT SHARE THE SAME THREAT HIERARCHY

Calling the Mecca agreement an anti-Iranian alliance is too simple. Pakistan shares a border with Iran and has little interest in a lasting confrontation. Turkey competes with Iran in Syria and the

Caucasus, but also trades with it. Saudi Arabia, meanwhile, has reopened diplomatic channels with Tehran. The Houthi crisis showed this ambiguity clearly: Pakistan supported Saudi Arabia politically, but avoided actions that might draw it into a wider confrontation with Iran.

Israel is more complicated still. Turkey increasingly sees Israeli military power as a regional concern, while Pakistan has no diplomatic relations with Israel and Saudi Arabia has not normalized ties. But this does not make Mecca an anti-Israel alliance. Riyadh may want to limit Israeli regional dominance while still keeping open the possibility of future normalization, particularly if there is progress toward Palestinian statehood. Its position is therefore less about choosing sides than preserving leverage.

India exposes perhaps the deepest weakness in the agreement. For Pakistan, India is its principal security concern. For Saudi Arabia, India is an important economic and strategic partner. If another India-Pakistan war broke out, would Riyadh really treat an Indian attack on Pakistan as an attack on Saudi Arabia? That is far from certain. CENTO faced a similar problem: its members did not share the same enemies. The Mecca agreement may ultimately face the same limitation.

WASHINGTON: ABANDONMENT, PUNISHMENT — OR LEVERAGE?

The Houthi crisis also tested the Saudi-American relationship. Crown Prince Mohammed bin Salman asked Washington twice for direct military assistance against the Houthis; the United States declined to strike at that stage, offering intelligence-sharing and targeting support instead, constrained by its wider engagement against Iran and by the Oman-mediated arrangement of May 2025 under which U.S. strikes on the Houthis had ceased (Reuters 2026c, 2025a). From Riyadh's perspective, it sought direct intervention and did not immediately receive it — reinforcing precisely the anxiety that made diversification attractive in the first place.

It is tempting to read Washington's restraint as punishment for Saudi diversification or for Mecca itself, but no public evidence supports that reading, and one development cautions strongly against it: on September 17 the State Department approved a possible \$24.3 billion sale of forty-eight F-35 aircraft to Saudi Arabia, arriving after Mecca and in the midst of the Houthi crisis (Reuters 2026f). Washington seems to be differentiating among forms of commitment — reluctant to launch a new campaign at Saudi request, yet still prepared to share intelligence, sell advanced weapons, and remain central to Saudi air power and missile defense.

THE NUCLEAR QUESTION

The agreement has revived an old speculation: that Pakistan's arsenal could become, formally or informally, a Saudi nuclear guarantee. The claim deserves skepticism. Possessing nuclear weapons and extending nuclear deterrence to another state are not the same thing — extended deterrence is among the most demanding commitments in international politics, requiring one state to persuade an adversary that it would risk catastrophic retaliation on another's behalf. European strategists spent the Cold War asking whether Washington would risk New York for Berlin; the Mecca version is equally stark — would Islamabad risk Lahore for Riyadh? Pakistan's nuclear doctrine and command structures developed overwhelmingly around India, and nothing publicly available demonstrates that credible extension to Saudi Arabia has been planned. Riyadh may benefit from strategic

ambiguity, but ambiguity is not a guarantee.

HEDGING AS STRATEGY

Saudi Arabia illustrates why treating the region as splitting into two rigid, mutually exclusive camps — what might be called binary bloc-thinking — fails to capture what is happening. Riyadh deepens defense ties with Washington, economic ties with Beijing, military ties with Islamabad, defense-industrial ties with Ankara, and keeps channels open to Tehran — each partner supplying something the others cannot: capability, capital, depth, autonomy, diplomatic optionality. The objective is to avoid excessive dependence on any single one. The configuration appears unusual only if one expects Cold War tidiness — the kind of clean, mutually exclusive alignment more typical of smaller or more dependent states than of secondary powers with several partners to play off one another (see also Goh 2005; Schweller 2006).

What is emerging is hedging — the deliberate preservation of competing strategic options under uncertainty about the future distribution of power — rather than neutrality or non-alignment. The Houthi crisis demonstrates both its logic and its limitation: diversification increased Saudi options, but it did not erase Saudi dependence on certain forms of American power, since neither Pakistan nor Turkey automatically entered combat while Washington alone could supply the intelligence and systems Riyadh needed. Steven David's concept of "omnibalancing" adds the domestic dimension: governments balance against threats to regime survival and domestic projects as much as against foreign militaries (David 1991). Vision 2030, Riyadh's flagship program to diversify the Saudi economy away from oil dependence, is Saudi Arabia's overriding domestic project, and war, missiles, and disrupted oil routes all threaten it directly — which helps explain why Riyadh seeks deterrence and de-escalation simultaneously.

EXCLUSIVITY, NOT PRIMACY

The Houthi episode sharpens an argument that requires precision: the United States is losing exclusivity much faster than it is losing primacy, and these are not the same thing. American weapons, intelligence, logistics, and command infrastructure remain without regional equivalent — the proposed F-35 sale is especially revealing, since even as Riyadh diversifies, it still seeks the most advanced American technology, and Washington retains the power to grant or withhold it (Reuters 2026f). What Gulf states increasingly resist is the proposition that cooperation with Washington should require exclusivity. Riyadh wants Washington and Beijing; Ankara wants NATO and autonomy; Islamabad wants China and the Gulf — partnership without exclusivity. Yet states can diversify relationships more easily than they can diversify capabilities: a Chinese commercial tie cannot replace a Patriot interceptor, nor can Turkish drones replace the ecosystem sustaining a Saudi air force built on Western platforms. The system is becoming more plural without yet becoming post-American; its hierarchy is weakening politically faster than the capabilities beneath it are disappearing.

Saudi-Israeli normalization belongs to the same picture. In July 2026, President Trump stated that Washington would not proceed with civilian nuclear cooperation unless Riyadh joined the Abraham Accords; Saudi Arabia has continued to insist on an irreversible pathway to Palestinian statehood first (Reuters 2026j). The nuclear agreement was later submitted to Congress without that normalization condition in its written text — a telling gap between the formal document and

the political condition attached to it by the president (Reuters 2026g). This is bargaining under asymmetric interdependence: Washington holds assets Riyadh wants, Riyadh holds concessions Washington wants, and Mecca communicates to Washington that Saudi Arabia now has alternatives — though, as the crisis showed, not always equivalent ones.

NETWORK, NOT ALLIANCE

Mecca may ultimately prove more interesting as a strategic network than as a classical alliance. Turkey contributes defense-industrial capacity and access to the Black Sea and Caucasus; Saudi Arabia contributes capital and geographic centrality; Pakistan contributes military mass, nuclear status, and access to South Asia. If these complementarities produce joint drone development, missile-defense cooperation, and interoperable defense industries, Mecca could become consequential without ever reproducing NATO — twenty-first-century competition running through ports, cables, and technology chains as much as front lines, in the sense captured by Henry Farrell and Abraham Newman's concept of "weaponized interdependence" (Farrell and Newman 2019). But the September crisis shows that building drones together and agreeing to fight wars together remain very different commitments.

HIERARCHY TO GEOMETRY — BUT NOT YET BEYOND HEGEMONY

As with the earlier discussion of threat perception, naming a single enemy would have forced the three signatories to publicly rank dangers they prefer to keep unstated; Mecca is, at bottom, an alliance against strategic vulnerability rather than against a particular country — a shared interest in defense-industrial autonomy and in enlarging each government's freedom of action.

Rather than dividing into a Mecca bloc and an Abraham bloc, the Middle East is moving from hierarchy toward geometry (Buzan and Wæver 2003). Yet geometry has not abolished hierarchy: Saudi Arabia may sign with Pakistan and Turkey, but when sophisticated missiles threaten its territory, American systems remain central to its calculations; Turkey can proclaim autonomy while NATO still protects it; Pakistan can turn toward the Gulf while relying on China for strategic depth. This is a Middle East in which the hegemonic power is increasingly contested and hedged against, while still holding capabilities, and the capacity to shape outcomes on the ground, that others cannot readily replace.

CONCLUSION

The September Houthi crisis may be remembered as the first genuine stress test of the Mecca Agreement, because it exposed what ceremonial diplomacy had concealed: Pakistan offered solidarity and ambiguity, Turkey offered condemnation and an evolving willingness to help, and Washington offered intelligence while withholding direct intervention — even as it advanced one of the most consequential proposed American weapons transfers to Saudi Arabia in decades (Reuters 2026c, 2026f, 2026h). That combination tells us more about the emerging regional order than any slogan about American withdrawal. The United States is neither leaving the region nor dictating outcomes within it; it is calibrating its commitment while protecting its own freedom of action. Saudi Arabia, for its part, is doing precisely what realism would expect under uncertainty: multiplying relationships so that no single outside power holds an absolute veto over its strategic choices.

"Muslim NATO." Anti-Abraham coalition. American abandonment. American punishment. All are tempting formulations, and all are too simple. The defining question of the emerging Middle Eastern order is no longer merely which side one is on, but against whom, on what issue, with which partner, using whose weapons, relying on whose intelligence, under what conditions, for how long, and at what price. The Mecca Agreement does not resolve those questions — the first Houthi crisis has shown that it cannot. It institutionalizes them. And that, more than any comparison with Article 5, may be the clearest evidence yet of the Middle East's return to the oldest habits of realist politics.

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