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IRAN

THE DAY AFTER

**War, Iran's Transition,
and the New Middle East**



Iran: The Day After and the New Strategic Architecture of the Middle East

by Ahmed Charai

Wars do more than inflict suffering. They reveal. They strip away diplomatic euphemisms, expose the fragility of inherited assumptions, and force nations to confront realities they have too long deferred. That is the deeper significance of the confrontation with Iran. The question before the Middle East is no longer only how this conflict is being fought, but what political order will emerge from it.

This edition of *The Jerusalem Strategic Tribune* is devoted to that question because the stakes extend far beyond the battlefield. What is now unfolding is not simply another episode in the region's long cycle of tension. It is a moment of strategic clarification. The old order, already eroded by years of hesitation, fragmentation,

and incomplete deterrence, has revealed its exhaustion. A region once managed through ambiguity can no longer be stabilized through ambiguity.

That truth is now impossible to ignore. When Iran escalates, the consequences are never confined to one border or one adversary. Shipping lanes come under pressure. Energy markets tighten. Airports, ports, desalination systems, digital networks, and financial confidence are drawn into the same field of insecurity. Disorder in one arena becomes vulnerability in all. This is no longer a landscape of separated crises. It is an integrated strategic theater.

For too long, many governments operated on the assumption that Iran's ambitions could be contained through partial responses and temporary arrangements. That assumption has failed. The issue now is not whether the old framework can be restored. It cannot. The issue is what must replace it.


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Any serious answer must begin with clarity about the regime in Tehran. We are not dealing with an ordinary State pursuing ordinary interests through conventional means. The ruling system in Iran has fused domestic repression with regional destabilization into a single governing method. Its violence at home and its aggression abroad are not separate phenomena. They are expressions of the same political order. A regime that imprisons dissent, humiliates women, crushes civil society, and kills its own citizens cannot be analytically separated from the militias it sponsors, the threats it projects, or the instability it cultivates across the region. Internal tyranny and external aggression are, in this case, indivisible.

Yet moral seriousness also requires a distinction that must never be lost: the Iranian people are not the regime. Iran is not reducible to the ideology that has ruled it by fear. It is one of the world's great civilizations, a nation of immense historical depth, cultural achievement, and human capital. Its people should not be confused with the machinery that has oppressed them and disfigured their country's place in the world. To oppose the regime is not to oppose Iran.

This distinction matters strategically as much as morally. The young generation of Iranians deserves better than permanent isolation, ideological captivity, and the suffocation of their national promise. They deserve institutions instead of repression, citizenship instead of fear, and dignity instead of confiscation by a revolutionary elite. A durable regional order cannot be built only on military calculations. It must also rest on the recognition that nations are not identical with the systems that temporarily dominate them.

The day after in Iran cannot be approached with romantic slogans or the illusion that collapse is self-correcting. The region has already learned, at great cost, that the end of tyranny is not the same thing as the birth of order. Where institutions are weak, vacuums do not remain empty. They are filled by

militias, fragmentation, criminality, external interference, and humanitarian breakdown.

For that reason, any serious day-after framework must begin with prudence. It must aim to preserve State continuity where continuity is necessary, secure strategic sites and national infrastructure, prevent internal disintegration, and avoid turning regime failure into national collapse. The objective should not be revenge, and certainly not chaos masquerading as liberation. It should be the possibility of a sovereign Iran capable, in time, of reentering the region and the world as a modern State rather than as the center of a permanent revolutionary project.

This places immense responsibility on the Iranian opposition, both inside and outside the country. If history presents them with an opening, they must be prepared to meet it not only with courage, but with seriousness. Their task is not merely to condemn tyranny. It is to demonstrate that a viable alternative exists. They must show that they are capable of thinking as custodians of a nation, not only as opponents of a regime. It means articulating a credible vision of constitutional order, pluralism, economic reconstruction, and peaceful regional integration. The fall of a regime is never sufficient. Legitimacy is not inherited from resistance alone; it is earned through preparedness to govern.

But Iran's future is not only an Iranian question. It is also a regional one. The confrontation with Tehran has now crossed thresholds that have destroyed the old illusion that its war with Israel could remain indirect, compartmentalized, or indefinitely manageable. A regime that threatens Israel directly, menaces Arab states, pressures mediators, and treats instability itself as an instrument of strategy cannot be understood as a conventional status quo power. It has made itself the principal engine of systemic volatility in the Middle East.

This is why the consequences of this war are so profound. For Israel, the issue is existential. For the Gulf states, it is immediate, practical,

and no longer avoidable. For the United States, it means that policy cannot be reduced to the management of one crisis at a time, nor to ceasefire formulas detached from strategic reality. The true questions are broader and more enduring: how to prevent Iran from reconstituting the strategic capacities that made this conflict possible; how to protect shipping, energy, airports, digital systems, and essential infrastructure; how to deepen coordination among the states most exposed to Tehran's ambitions.

This is where the idea of a new regional architecture becomes decisive. The security of Israel and the security of key Gulf States can no longer be treated as separate files. They are elements of the same strategic equation. Missile defense, early warning, intelligence-sharing, maritime security, cyber resilience, infrastructure protection, and coordinated deterrence must now be understood as parts of a single system. If the threat is integrated, the response must be integrated. Strategic fragmentation is no longer sustainable in a region where adversaries operate across multiple domains simultaneously.

The United States must remain the strategic balancer, the ultimate guarantor of deterrence, and the indispensable enabler of allied coordination. But it should not be expected to carry every burden alone, nor should its partners behave as though American power exempts them from strategic responsibility. A mature order is one in which American leadership is preserved precisely because regional capacity is strengthened. That is not retrenchment. It is strategic intelligence.

Nor should the region accept the false choice between naïve diplomacy and endless war. Serious statecraft requires both pressure and judgment. It requires diplomacy where diplomacy is credible, deterrence where deterrence is necessary, and realism at every stage. If Tehran is engaged, it must be from a position of strength rather than illusion. If force is used, it must remain tied to defined objectives

and not dissolve into emotional impulse or strategic drift. The purpose of power is not perpetual conflict. It is the construction of a more stable peace.

The essential question is not simply how this war concludes, but what order is built from its consequences. The Middle East will not be secured by nostalgia for fading arrangements, nor by the hope that old ambiguities can contain new threats. It will be shaped by those capable of transforming confrontation into structure, deterrence into architecture, and necessity into vision.

But no such vision will be complete if it forgets one central truth: the Iranian people matter. Their suffering matters. Their future matters. The legitimacy of any new regional order, and of the Western policy that supports it, will be judged not only by its ability to contain a regime, but by its ability to remember the nation that regime has oppressed, silenced, and dishonored. *

AHMED CHARAI

— Publisher

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IRAN'S WORLD WAR

Credit: Morteza Nikoubazi via Reuters Connect



by *Dov S. Zakheim*

Iran's Revolutionary Guard Corps (IRGC) is fighting for its life. It has long been the most powerful force in Iran, controlling its own army and navy, as well as a major portion of the country's economy. It also controls the Basij organization and supports both Iran's proxies— Hamas, Hezbollah, the Yemeni Houthis and the Iraqi militias. American and Israeli attacks are decimating its leadership on a daily basis, as are its powerful missile and drone forces and its command and control capabilities.

The IRGC was closely associated with Ali Khamenei, the country's long-time Supreme Leader, who was killed in an Israeli air strike that opened the latest iteration of America and Israel's war with Iran. It has close links with Mujtaba Khamenei, his father's putative successor, though whether he will survive the ongoing war, or even if he dies, whether he will actually assume control of the government, is highly uncertain. Similarly, is it far from clear that the IRGC might survive in its current form.

It is the IRGC that is conducting the war in the name of Iran. With its back to the wall, the

IRGC not only has retaliated against Israel, but it has also struck American bases throughout the Gulf and beyond, often killing civilians in the process. In doing so it has committed a major strategic mistake, no doubt out of panic and its loss of a coherent chain of command.

As a result of its attack Iran has alienated, with very few exceptions, the Gulf Arabs, Turkey, and many European states, all of which had preferred to remain neutral in the current contest. Within days of the initial Israeli strike that killed Ali Khamenei and several of his leading associates, the IRGC fired missiles and drones at American bases or facilities in all six of the Gulf Cooperation Council states—the United Arab Emirates, Saudi Arabia, Bahrain, Qatar and Kuwait. Not only had none of these states wanted to get dragged into the conflict, they had quietly been improving their relations with Tehran in the past few years.

The Iranian attacks put paid to those relations. Within a few days of the war's onset, the Emiratis had intercepted 154 Iranian missiles—13 others fell into the sea—and 506 drones. Thirty-five drones did crash inside UAE territory causing what the government termed “material damage.” Drone debris hit Etihad Towers in Abu Dhabi on the second full day of

the war. The building housed not only the Israeli Embassy; but other offices as well. The strike lightly wounded a woman and her child. On the same day Emirati Air defenses intercepted Iranian drones over Dubai, but fragments from the drones fell on two homes and wounded two people. Fragments from another drone that the Emiratis intercepted over Dubai caused a fire on the facade of the world-famous Burj Al Arab hotel, while there was also an attack on Dubai international airport that wounded four people. So far the attacks have resulted in the death of three people.

It is true that the UAE has long been at odds with Iran ever since the late Shah seized the Emirati islands of Abu Musa and the Greater and Lesser Tunbs in November 1971. Even so, the UAE had not committed itself to support the American-Israeli attack. Moreover, Dubai's trade with Iran has been an open secret for many years. For the Iranians to hit Dubai in particular simply has made no sense.

Like the UAE, Sunni-led Bahrain has resented Iran for years; the Manama government claims that Tehran foments revolution within the country's Sh'i'a majority. Indeed, since at least the 1950s, Iran has claimed that Bahrain is its 14th province. Iran has launched attacks on Fifth Fleet headquarters in Bahrain. It has hit the Crowne Plaza hotel in Manama and caused damage at the country's international airport. Of all the unprovoked attacks that Tehran has launched against the Gulf states, those on Bahrain at least are consistent with long standing tensions between the island and its large neighbor.

The Iranians have also attacked the Riyadh region of Saudi Arabia, as well as the petroleum-rich Eastern Province. The outraged Saudis have pointed out that Iran launched these attacks “despite the Iranian authorities knowing that Saudi Arabia confirmed that it would not allow its airspace or territory to be used to harm Iran.”

The Iranian attacks on the other Gulf States have made even less sense. It is true that Qatar hosts America's largest Middle Eastern base

at al-Udeid. But Doha has always maintained proper relations with Tehran. Nevertheless, it too has intercepted missiles and drones that Iran launched against its territory.

Similarly, though Kuwait houses Army Central Command Headquarters forces at Camp Arifjan, as well as air units at Ali Al Salem Air Base, and a logistical support unit at Shuaiba port, it has generally maintained a low international political profile ever since the first Gulf War. Yet it too has been the scene of drone attacks, one of which resulted in the death of eleven American servicemen.

Of all Iran's attacks on its Gulf neighbors, those on Oman make the least sense of all. It is true that Oman, like the other Gulf Oman hosts American units at several locations. Nevertheless, the country has always maintained friendly relations with its much larger neighbor across the gulf that carries its name. The Omani leadership certainly recalls that Iran came to the aid of Sultan Haitham bin Ali al Said's late cousin and predecessor, Sultan Qaboos, in the 1970s that enabled him to quash the Dhofar rebellion. Moreover, Oman has always acted as a go-between, serving as a venue for negotiations between the United States and Iran, including one of the latest rounds that preceded the outbreak of war.

The Iranians have not only targeted American facilities. They have also aimed drones and missiles at British and French facilities in the Gulf. And Iraqi militias, no doubt on instructions from the IRGC, have fired missiles toward Irbil, the capital of the Kurdish Regional Government in Iraq.

The Iranians have not limited their attacks to their Gulf neighbors. According to the Jordanian military the IRGC launched 49 drones and ballistic missiles at the country. Like Saudi Arabia, Jordan houses some American units, but again like the Saudis, Jordan had not allowed American or Israeli aircraft to transit its airspace in order to hit Iran.

In addition, the Iranians have fired at the British sovereign base at Akrotiri, Cyprus, and

perhaps most surprisingly at a target in Turkey, which has maintained correct relations with the Mullahs since they first came to power in 1979. Iran also launched a drone attack at Azerbaijan's airport at Nakhchivan thus expanding the war even further beyond the Gulf. And an American submarine torpedo sank the Iranian frigate *Iris Dena* some 25 miles from the Sri Lanka coast, further enlarging the theater of war.

There can be little doubt that the IRGC has been boxed into a corner, and having had its command and control capability devastated by American and Israeli attacks, no longer is firing its dwindling drone and missile assets in a coherent fashion. Instead, it seems to be impervious to the fact that in alienating more and more states, it is only digging itself deeper in a hole from which it might never emerge. Indeed, its unprovoked attacks have found them at odds with both sides of both long-standing rivalries such as Greece, which is supporting Cyprus, and Turkey, and more recent ones, notably Saudi Arabia and the UAE.

The IRGC still retains considerable power inside Iran, and may remain at the country's helm, whether by controlling whoever replaces the late Supreme Leader, or by having one of its own take charge. It does face a potential challenge not only from the hundreds of thousands, if not millions, of Iranians who seek at least some degree of regime change, but also from its rival, the regular army, which thus far has kept its powder dry.

Given these factors, and the hostility its faces from states that it need not have provoked, at war's end the IRGC like Iran will certainly be far weaker than at any time since its emergence in 1979. And that can only increase the prospect for a more stable and peaceful Middle East in the immediate and, hopefully, longer term. *

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THE MIDDLE EAST AFTER THE IRAN WAR: LESSONS AND OUTCOMES



by James Jeffrey

It is ambitious at this point given the uncertainties of the raging Iran War to inventory likely lessons and outcomes on the region's future. But it is also necessary, as analysis of alternative scenarios should best begin before a major inflection point is upon us. That inflection point could range from the end of the Islamic Republic and a new, quite possibly permanent peace order in the region, to a disguised American defeat and the rise of an even more radical, aggressive Iran, despite its disaffected population and tremendous losses. This essay examines first the state of the campaign, then the lessons learned, and, finally, the alternative endings. Despite the absolute necessity of Israel and the United States finally bringing war to an Iran that has brought war to the region for decades, there are no guarantees all will work out better.

WHERE WE ARE

The war now is one of attrition. Neither side is willing to commit ground troops, typically the decisive element of war. (U.S. Marines rushing

to the region do not refute this assessment: so far the ground combat component of that force is but two lightly-armed maneuver battalions. Over fifty American and UK maneuver battalions many with armor were used in the 2003 assault on Iraq, whose territory, population and security forces were a fraction of Iran's.) The centers of gravity on both sides for the moment are holding up under military pressure: Iran's command and control, its domination of a still-cowed population, ability to block shipments out of the Gulf, and its missile and drone stocks; the United States, Israel, and Arab states' internal cohesion, weapons stocks, and despite considerable oil and gas price increases, economies.

Most importantly, neither side is displaying a decisive collapse of will, with Gulf Arab states in particular so far demonstrating both resilience and defiance of Iran. Under such conditions, the conflict likely will either shift to negotiations with or without a ceasefire, or escalate, most likely devastating attacks on each other's hydrocarbons infrastructure with long term impact on regional and even global economies. Such escalation in turn would produce either a negotiated compromise ending, or the collapse of will of one of the participants. (That will not be the Israeli government and population. For Israel this conflict, correctly, is existential and costs so far easily bearable.)



WHAT WE'VE LEARNED

The short answer is a great deal in a very short time. But of the many lessons learned, the below are the most important.

Iran is a Cause More than a State: as Kissinger once pointed out, Iran presents as both, to its advantage especially in confusing the West about how best to deal with it. (Although the millions of victims of Iran and its proxies' aggression in Yemen, Iraq, Syria, Lebanon, Gaza and Israel have long learned this lesson.) Its attacks on civilian targets in neighboring states seeking to remain neutral, and targeting of international oil supplies, have revealed the regime's nature. States may pursue temporary transactional deals with Teheran but cannot expect it to abandon its hostility to the entire regional system. The region thus will never be

really at peace unless either the very nature of the regime changes into that of a normal state, or it is stripped of all capability, in perpetuity, to project power through nuclear weapons, drones and missiles, terrorists and proxies.

Ideology Is Asymmetrical: Much ink is spilled on different weapons systems and tactics producing asymmetric results, but the best example of asymmetry in this conflict is Iran's ability to prioritize its ideological mission of regional domination and religious orthodoxy over its own population, economy and even military losses in a way most normal modern states cannot. This gives Iran and other ideological states an ability to either motivate or terrorize their populations to support the cause being pursued. In short, it's hard to break the iron will of ideological states at almost any pain level. Modern liberal states (Israel, America

after Pearl Harbor) can show equal will but only in the most extreme, existential situations.

Hydrocarbons Still Rule: This lesson begins obviously with the oil-rich Gulf states but applies significantly to the entire global economy and even to distant, oil and natural gas rich America.

Insurgents Win by Not Losing: Given all the above, this adage also applies to this conflict as Iran in many respects is running an insurgency against the rest of the region.

Modern Militaries Do Not Easily Innovate: Many see a key lesson in the ability of cheap but numerous air attack systems such as drones and rockets to overcome sophisticated but far more expensive and numerically limited defensive systems. But that lesson has been learned for over a decade by Israel, and since 2022 by both Ukraine and Russia. What is surprising is that the United States with the world's most innovative high-tech economic/research base and most powerful military didn't respond effectively to those lessons learned. The result in this conflict is even high-value scarce systems such as THAAD missile defense radars targeted, and stocks depleted. It's not that the U.S. military ignored those lessons, it's that its formula for adapting to them—ponderous study, peacetime procurement rules, myriad legal hurdles and challenges, and refusal to accept “perfect is the enemy of the (get it now) good”—has not worked.

The United States Has Structural Problems With Clausewitz: Clausewitz, thinkers before him such as Machiavelli, and more modern practitioners such as Colin Powell all understood the importance of determining what realistic political goals are before trying to match military means to them, and of the truth that nations, not armies, wage wars. The baroque planning and often shifting explanations of the Trump administration in this conflict suggest this is a unique Trump administration problem. But an examination of previous American wars, including Iraq, Afghanistan, and Vietnam, documents this as an inherent problem in U.S. military and policy thinking.



U.S. Gulf Bases Are a Double-Edged Sword: The U.S. began a serious Gulf states base build up after the Kuwait War on the assumption that American bases in a country would deter a major ground attack by signaling American resolve (and necessity with its troops at risk) to defend the basing country. They then were re-configured as air and logistics centers for American operations 2001 on in Afghanistan, Iraq and Syria, with a secondary mission of containing Iran. But these bases not only have not deterred Iran from effectively attacking the basing states from the air, but these bases themselves have been magnets for Iranian military action.

The GCC “Pull” Economic/Cultural Model In Question: Along with tough questions about the American security role, Gulf states given Iran’s possible survival as an aggressive force must rethink their shift to an international “pull” posture. For almost a century these states were “push” actors in the global economic, political and societal realms. Job One was “pushing” hydrocarbons into the world economy and thereby growing rich. This model allowed those states to maintain traditional religious and social mores, trade with the outside world without adopting its norms, and coexist with disruptive aggressive states, thanks both to American support and to the hydrocarbon “push” economies of those aggressive states Iran and Iraq themselves.

But in the last twenty years led by the UAE, Qatar, and then decisively Saudi Arabia, the Gulf has shifted to a “pull” economic model, leveraging immense oil and gas riches to pull in the advanced outside world, as a transportation, tourist, cultural, sports and financial center, think new Londons and Cotes d’Azur. But this shift, reflecting in part declining long term sustainability of hydrocarbons-based economies, required embracing modernity in its myriad forms, and thus dramatic changes in their entire societies. The resulting model however is more dependent both on a peaceful environment and the gradual fading of



traditional religious and social norms. But Iran across the Gulf is a force for neither peace nor modernity, and much more capable of disrupting “pull-based” than “push” societies.

Israel Militarily Dominant But Not Invincible: Israel’s extraordinary military success both offensive and defensive, the Israeli people’s resilience, and its intelligence capabilities in this conflict give it dramatic dominance in the region, building on its previous success with the help of others decimating the Iranian proxy network. But it does not have the strategically mobile ground forces to decisively defeat Iran or other distant foes. Its security thus cannot rest solely on its impressive military might but also on its political decisions concerning America, Europe, Arab states, the Palestinians, and Iran and other foes.

The United States Remains the Only Global Power: Despite Russia and China’s strong economic, diplomatic and “anti-American axis” ties to their chosen Middle East power, Iran, they have not done anything significant to stop America’s operations against Iran, and in fact do not have the military or other tools to affect decisively the conflict even if they wanted to. This does not mean they are not dominant players in their own regions, or that they are not positioning to profit from the Iran War, especially anything like an American failure. Europe, despite its military dependence on the U.S. and vulnerability to hydrocarbons, is even less able to play a realpolitik role either assisting, or defying, Washington.

American Global Deterrence is in Play: Notwithstanding the just above, the United States has huge stakes beyond global economic health and Middle East stability in this conflict. Its entire global collective security system is tested by it. This is not a new phenomenon but has to be continuously learned anew. That collective security system has kept the world at peace (at least in terms of the alternative 1914-45 experience), and constrained powerful wannabe challengers to the system including



Russia and China. But it requires the United States, as seen in the first years of the Cold War in Berlin, Greece and Korea, to engage and win in distant conflicts of limited strategic importance. Otherwise, the deterrence and containment principles on which the entire collective security system and thus international peace and prosperity rest come into question.

OUTCOMES

Regime Collapse Generates Regime Change: The Israeli military is focused on regime collapse, that means the inability of the Iranian political and military leadership to effectively govern and maintain monopoly of violence, the prerequisite for the population to overthrow the regime. While military strikes can erode regime control, total collapse may not be possible, and even if collapsed, there is no guarantee the population would rise up, or that if it did the outcome would be a “normal” nation. It could also be chaos, or an Assad or Saddam style non-ideological but still aggressive dictatorship.

Plus ca change: The current stalemate may lead to negotiations to end fighting and provide a solution, even if partial, to the Iranian nuclear program and especially the buried 400 kilograms of highly enriched uranium. This result, despite the much greater military damage, will look a lot like that of the June 2025 Twelve Day War. Iran’s capabilities will be diminished, but not its will; it will seek to rebuild its proxy network and weapons programs to once again challenge the status quo. Within a few years the situation will look much like 2000, before Iran began its serious march through the region and accelerated its nuclear program.

Disguised Defeat: This outcome would resemble a much larger version of the Trump 2025 ceasefire with the Houthis. Iran will stop shooting in return for an end of American and Israeli bombing. But its ability to hold the Straits at risk, and maintain at least elements of its nuclear program, will remain, and along with

them its ability to destabilize the region.

Open Defeat: Iran’s current strategy is simply to keep shooting with whatever is left of its not inexhaustible but very large weapons stocks until the pain on Gulf states and the American public, diminishing American and regional partners’ own weapons stocks, and events in elsewhere, force the U.S. and Israel to end operations, with or without a face-saving formal understanding with Iran. This would leave Iran with enhanced prestige to seriously threaten the Gulf hydrocarbon business and advance its nuclear program.

CONCLUSION

The region, the United States, and the world will all be much changed by this conflict, as fundamental issues are in play: the relative power of major states and their ability to maintain their will; capacity of ideological totalitarian states particularly if threatened to disrupt disproportionately the entire international order; the enduring vulnerability of the global economies for hydrocarbons. Israel, Gulf States and Iran will all have to think through how they move forward in a region with potentially never-ending disruption, with the boundaries of escalation ever more eroded. The United States for its part will have to decide how much of its domestic and international political capital, economic cost, and military effort it can devote to a region which while critically important to the global economy, is still secondary to existential American interests. *

— JAMES JEFFREY

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Credit: Robyn Stevens Brody/Sipa USA via Reuters Connect

THE SECULAR EARTHQUAKE

HOW IRAN’S RUPTURE SHAKES THE FOUNDATIONS OF ISLAMIC GOVERNANCE



by Raghu Kondori

The fall of Iran’s Islamic regime is not reform—it is a rupture. It dismantles Tehran’s axis of resistance across the Middle East while redirecting jihadist activity into Africa’s fragile states. From Proxy Collapse to the Recognition of the Republic of Somaliland, the consequences are reshaping regional power, governance, and strategic calculations.

MIDDLE EAST: PROXY NETWORKS COLLAPSE

Since 1979, Iran has relied on proxy warfare to extend influence beyond its borders. Hezbollah in Lebanon, Shiite militias in Iraq, the Houthis in Yemen, and Hamas in Palestine have all been supported with arms, funding, and ideological guidance (Carnegie Middle East Center, International Crisis Group). These networks allowed Tehran to intervene indirectly in regional conflicts, shape political alignments, and exert pressure on neighboring states. Over decades, they became both military and political instruments, enabling Iran to maintain influence even where direct presence would have been impossible.

The collapse of the Islamic regime disrupts this system. Hezbollah, dependent on Iranian financing and weaponry, faces Lebanon’s

domestic political dynamics without its previous support (Wilson Center). The Houthis are deprived of essential components for ballistic missiles and drones (Council on Foreign Relations). Iraqi militias fragment into smaller local entities, reducing their capacity to influence national politics. Syria’s Shiite enclaves lose operational capability, and in Palestine, Hamas must adjust to the absence of ideological and material support, relying instead on pragmatic statecraft (European Council on Foreign Relations).

Historical comparisons illustrate the risks of abrupt collapses. The Soviet withdrawal from Afghanistan in 1989 contributed to the rise of al-Qaeda (RAND Corporation), while the Arab Spring produced instability in contexts where institutions were weak (Brookings Institution). Iran’s secular transition may similarly produce vacuums, leaving proxies unsupported and grievances unresolved. These gaps may not immediately manifest as conventional military threats but increase the likelihood of localized conflicts, insurgent activity, and political fragmentation across multiple states.

The dissolution of Tehran’s network alters the regional balance. Lebanon’s political structure, long mediated by Hezbollah’s influence, is exposed to internal factional contests. Iraqi militias operate independently, challenging Baghdad’s central authority. Syria’s Shiite enclaves retract in influence, and Palestinian factions face strategic recalibration as Iranian sponsorship disappears. This

environment forces both regional and external actors to adjust strategies, intelligence priorities, and security approaches.

Additionally, Iran’s historical export of ideology, not merely arms, ensured that its influence extended into the political and social frameworks of these societies. The secular rupture interrupts Tehran’s ability to shape local governance, sectarian alignments, and political narratives. Middle Eastern states now confront structural change without the ideological cohesion previously provided by Iranian networks.

IRAN’S SECULAR UPRISING AND THE ROLE OF OPPOSITION

Iran’s secular transformation is reinforced by domestic political movements advocating for democratic reform. Popular protests and slogans such as “Pahlavi will return” and “Javid Shah” signal a public demand for secular governance, national sovereignty, and a democratic future. These slogans are more than symbolic; they reflect widespread support for the leadership of Reza Pahlavi, the internationally recognized head of the opposition.

Under Pahlavi, the opposition explicitly promotes a nonviolent, democratic transition, emphasizing political pluralism, human rights, and the end of ideological export through proxy warfare. The movement represents a domestic effort to reclaim Iran’s civilizational identity and restore governance structures based on secular democratic principles rather than clerical authority.

This movement situates Iran’s secular transition within a political and cultural framework. The collapse of the Islamic regime is accompanied by efforts to reestablish national identity, free from clerical domination. Public support for Pahlavi reflects both political aspiration and a civilizational project: restoring Iranian governance to democratic norms while ending the export of sectarian ideology.

The secular opposition also redefines Iran’s foreign policy orientation. A democratic, Pahlavi-led Iran would sever ideological ties to groups such as Hamas and Hezbollah, focusing instead on national interest, regional stability,

and constructive diplomacy. This realignment has direct implications for the Middle East and Africa, as proxies lose support and states previously affected by Iranian intervention must adjust to new realities.

AFRICA: JIHADISM ON THE MOVE

The collapse of Iran’s proxy network in the Middle East has direct implications for Africa. This is not Iranian jihadism relocating wholesale, but ideological and logistical fragmentation seeking permissive environments. Groups that previously relied on Iranian sponsorship are now relocating or adapting to states with weak governance. In the Sahel, Mali, Burkina Faso, and Niger experience increasing insurgent activity, as militant organizations combine local disputes with transnational jihadist objectives (CFR Global Conflict Tracker). Somalia remains particularly fragile, where al-Shabaab and ISIS-Somalia extend operations across both land and maritime routes (UN Security Council).

Environmental stress exacerbates instability. Desertification, floods, and crop failures in Mali, Sudan, and Somalia increase competition over scarce resources and intensify local grievances, which insurgent groups exploit (UNDP Africa). Climate pressures intersect with governance gaps, producing conditions favorable to insurgent adaptation. Western military withdrawals further reduce stabilizing influence, accelerating the transformation of insurgencies from state-supported to decentralized networks.

Amid these challenges The Republic of Somaliland offers a different model of stability. Its democratic government, rooted in clan agreements and community oversight, limits insurgent influence (Chatham House). Israel’s recognition of Somaliland in December 2025 strengthened security coordination, port operations, and economic integration (Times of Israel). Broader recognition by Washington, Gulf states, and Europe further enhances Somaliland’s capacity to maintain stability in the Horn of Africa.

Iran’s historical ties to Sudan also carry strategic significance. Khartoum had functioned as a conduit for arms transfers to the Houthis

and a gateway to the Red Sea (BIC-RHR). A secular government in Tehran would terminate these channels, reducing military support to Yemen, weakening Iranian influence in the Red Sea, and encouraging Sudan to align with Sunni regional partners.

The collapse of Tehran's influence provides an opportunity for African states to redefine security priorities. Limiting external arms and support to insurgent actors allows governments to focus on stabilizing governance structures, securing trade routes, and strengthening institutions. Somaliland's model demonstrates that legitimacy, recognition, and institutional coherence can support durable security even in fragile regions.

This shift also encourages a reassessment of regional alliances. States in the Horn and Sahel now have incentives to expand cross-border security cooperation, implement intelligence-sharing frameworks, and invest in community-based policing. These measures, coupled with international support, can reduce the ability of transnational insurgencies to exploit governance vacuums.

CULTURE, STRATEGY, AND POLICY IMPLICATIONS

Iran's secular transition carries broader cultural, strategic, and policy implications. Domestically, Persian cultural heritage, literature, and historical identity gain prominence as the ideological export of the previous regime ends (Smithsonian). Sectarian networks funded by Tehran lose influence, while pluralism and civic engagement emerge as frameworks for social and political organization.

In Africa, cultural resilience is essential to counter extremist influence. Strengthening indigenous practices and Sufi traditions reduces the appeal of externally imported ideologies (Brookings). Governance, cultural legitimacy, and social cohesion together are critical to limiting insurgent influence.

Regionally, the collapse of Iran's proxy network necessitates adjustments by Gulf states, Israel, and Western actors. Gulf states can shift from containment strategies toward reconstruction and stabilization (Atlantic

Council). Sudan's realignment away from Iran reduces weapons flows to regional conflicts, while Israel's collaboration with Somaliland provides a model for proactive security management and intelligence sharing.

The secular transformation of Iran reshapes strategic calculations across the Middle East and Africa. Proxy networks are weakened, insurgent activity is redistributed, and regional actors must recalibrate their approaches to security and governance. Cultural and political legitimacy, combined with international cooperation, are essential to mitigating instability.

Over the long term, a secular, Pahlavi-led Iran offers potential for normalized diplomatic relations, a focus on national interests, and a reduction of regional ideological conflicts. African states, in response, can strengthen governance structures, reinforce cultural institutions, and pursue cooperative security strategies. Together, these developments represent a significant reorientation of geopolitical, strategic, and cultural dynamics across two continents.

The Middle East and Africa are entering a transitional period. Regional actors must prepare for the direct consequences of Iran's secular shift and the indirect effects on insurgent distribution, state capacity, and political alignment. The effectiveness of regional responses will depend on the integration of security, governance, and cultural legitimacy, supported by both local and international actors. *

— RAGHU KONDORI

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Periscope view of Iranian warship Dena being sunk by U.S. Navy submarine, 4 March 2026.

SILENT SERVICE, SILENT DEATH...



by James Foggo, Steven Wills

While the other fighting arms of the United States Navy, including naval aviation, the surface navy, and naval special warfare have been at war numerous times since the end of World War 2, the U.S. Navy submarine force has not actually been in recorded combat since 14 August 1945, when the *Tench* class submarine USS *Torsk* sank the Japanese Class C escort vessel (Kaibokan) *Vessel #13*, a ship whose ominous number indeed proved a fatal moniker. Since then, U.S. navy submarines have launched many missiles at targets ashore, but their torpedo tubes have been silent for eighty plus years. That changed on 04 March 2026 when an unidentified U.S. nuclear submarine torpedoed and sank the Iranian Navy frigate *Dena*, a ship not much bigger than Kaibokan #13, with a Mk48 antiship torpedo. There have been only four officially recorded sinkings by submarine since 1945, but when employed, underwater attacks had outsize effects on the actions of the opposing side's navy and war effort. The use of a U.S. submarine in a direct antisurface action also sends a strong deterrence message in the present, not only to what's left of the Iranian navy, but also to would-be adversaries such as Russia and China. U.S. submarines work as advertised and can strike without warning and with lethal results.

Each case of submarine attack since 1945 has generated outsize political effects. The 1971 sinking of the Indian frigate INS *Khukri* by the Pakistani submarine *Hangor* shocked the Indian navy and spurred it into greater action against its Pakistani opponent, resulting in its eventual defeat and loss of 1/3 of its fleet. The 1982 sinking of the Argentine cruiser *General Belgrano* by the British Royal Navy submarine HMS *Conqueror* was the first such

combat action of a nuclear-powered submarine and caused the Argentine Navy to withdraw its navy from active participation in the Falklands war, easing the eventual British reconquest of those islands. Finally, the sinking of the South Korean Navy corvette *Cheonan* by an unidentified North Korean submarine nearly plunged those nations back into active conflict. The act did confirm the ongoing aggressive behavior of North Korea and demonstrated that its submarine fleet was capable of offensive action. The torpedoing and sinking of the Iranian frigate *Dena* equally sends a powerful message as did the three earlier sinkings in that Iranian ships are nowhere safe during that nation's ongoing conflict with the United States and Israel. To paraphrase an old financial community commercial, "When submarines sink ships, nations listen."

The other recipients of the message sent by the U.S. sinking of the *Dena* are U.S. competitors Russia and China. While the Russian surface fleet has been plagued by poor combat performance in the Black Sea its submarines have improved significantly since the end of the Cold War in terms of reliability and quiet operations. Expect to see continued Russian financial emphasis on their submarine force, likely at the expense of other arms of the Russian navy. China has already been building nuclear submarines at an advanced pace. China possesses sixty submarines of which 14 are nuclear powered. The capability of current and future Chinese submarines is uncertain, and likely not the equal of those fielded by Western states including the United States. That said, Soviet Cold War naval commander Admiral Sergei Gorshkov reputedly stated, "Quantity has a quality all its own," and greater numbers of nuclear submarines would no doubt aid Chinese naval forces in accomplishing their wartime objectives.

Just as the sinking of the Israeli destroyer *Eilat* on 21 October 1967 focused the attention of

world navies on the power and combat potential of cruise missile weapons, the sinking of *Dena* may prompt a return by navies to return to the kind of massive antisubmarine warfare exercises last seen in the waning years of the Cold War. A single nuclear submarine armed with torpedoes and cruise missiles is the modern equivalent of the famous German surface combatant raiders of the Second World War such as *Bismarck*, *Scharnhorst* and *Graf Spee*, but with exponentially greater stealth and combat capability, including strikes on land-based targets. During World War 2 it took dozens of warships to localize, engage and destroy these very capable surface ships. Finding and sinking a nuclear submarine is an even more wicked problem for naval forces, so expect to see them start practicing in earnest.

Armed conflict is always regrettable, but efforts to delimit Iran's ability to build a nuclear weapon and continue to export violence through its vociferous network of terrorist proxies failed. Accordingly, Iranian leadership is experiencing first-hand the aftermath of their failure to anticipate the resolve of a determined America. That said, the images of the sinking of the Iranian ship *Dena* may now herald what many experts have been saying in regard to possible peer conflicts in the Indo-Pacific. Nuclear submarines are one of the crown jewels of American naval capability, and this event is a rare, but powerful example of what they can accomplish when deployed in combat.

To be clear, none of this is easy. Whether submerged or at periscope depth a submarine approach and attack is a sophisticated operation whereby a lot can go wrong. One should however remember the World War 2 U.S. navy torpedo crisis of 1941-1943. The U.S. Mk-14 torpedo's magnetic exploder consistently failed early in the war, and multiple opportunities to sink Japanese aircraft carriers and critical Japanese logistics ships were lost. It finally took a direct complaint from legendary submarine commander Dudley "Mush" Morton to Pacific submarine commander Admiral Charles Lockwood, who already had doubts on the utility of the magnetic exploder. The results of the tests, and the intervention of fiery CNO Admiral Ernie King "lit a fire" under the Navy Bureau of Ordnance to fix the weapon by late 1943. Admiral Hyman G. Rickover later said, "Success teaches us nothing; only failure teaches," and the U.S. Navy

learned much about weapons testing from the failure of the Mk14 torpedo. Fortunately, in the case of the *Dena*, everything went right.

As the United States Navy did in the Red Sea against unprovoked Houthi aggression, it would be wise to take on board lessons from Operation Epic Fury in light of combat success. When our nuclear-powered submarines go to sea, shut the hatch, and dive the boat, we are always ready for war. We train, we run gun drills, and we challenge ourselves with sophisticated exercises in three dimensions at sea all the time. In this case, it paid off. The *Dena* was the flagship of the Iranian navy and it is now gone. The U.S. navy however must work to learn from combat against *Dena* and other Iranian targets, as we perfect our training, tactics, and procedures for future combat operations against potentially more powerful navies in the Western Pacific or the North Atlantic.

U.S. nuclear submarines are the best crewed examples of their type in the world, the legacy of nuclear navy founder Admiral Rickover's endless drive for success. The U.S. has provided a small example of the fate that awaits other adversaries from our unseen deterrent under the sea. The U.S. Navy must also now keep the edge it possesses in nuclear submarine technology, and continue to learn from both success and failure. Welcome to the new century of submarine warfare. *

— JAMES G. FOGGO

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THE IMPACT OF MIDDLE EAST UPHEAVAL ON UKRAINE



by Michael Gfoeller

The geopolitical landscape of February 2026 is marked by overlapping conflicts, and the ongoing war between the United States and Iran will have profound consequences for the ongoing Russia-Ukraine war. Tensions in the Middle East have reached dangerous levels. A direct conflict involving Iran will not remain confined to one theater. It is diverting Western resources, destabilizing global energy markets, interrupting military supply lines, and reshaping international alliances. In the short term, such a war will likely tilt the balance toward Russia in Ukraine, granting Moscow breathing room and economic advantages, particularly as oil prices rise. Over the longer term, however, prolonged regional instability or an unfavorable outcome for Iran could expose serious vulnerabilities for Russia's broader strategic position.

One of the most immediate consequences is the diversion of American and allied attention and military aid away from Ukraine. The United States, already balancing commitments to Israel and Ukraine, has deployed substantial air and naval forces to the Middle East in order to strike Iranian nuclear sites or missile infrastructure. This concentration of assets signals a shift in Washington's priorities, especially under a leadership that has used strong rhetoric about regime change and has threatened decisive action if Iran crosses certain red lines. For Ukraine, this redirection implies intensified competition for critical supplies: artillery shells, air-defense interceptors, and advanced systems needed to counter Russian ballistic and cruise missiles may well be rerouted to protect U.S. bases, Israeli population centers, or Gulf allies from Iranian retaliation.

A prolonged U.S.-Iran conflict would likely deepen this strain. Even the brief 2025 Israel-Iran exchanges demonstrated how quickly Middle Eastern priorities can overshadow support for Ukraine, temporarily delaying shipments of munitions and equipment. In a larger war, the effect would be magnified. American decision-makers might prioritize theaters where U.S. personnel face direct risk, sidelining Ukraine's requirements amid a high-stakes crisis. European allies, confronted with energy price shocks and economic pressure, could also scale back their assistance. Ukraine would then be forced into a more defensive stance, while Russia could exploit the moment to intensify attacks on infrastructure, railways, and power grids, accelerating incremental territorial advances in eastern regions such as the Donbas.

The conflict will also reduce global diplomatic and media focus on Ukraine. With attention fixed on developments in the Persian Gulf, Russia would face less immediate international scrutiny and could escalate hybrid operations, such as cyberattacks, without triggering the same level of coordinated Western response. Ukrainian leaders have repeatedly emphasized that Iran's support for Russia poses a serious threat to their defense, and any escalation that weakens that support chain will be welcomed in Kyiv. Yet the broader distraction will almost certainly benefit Moscow more in the near term, allowing it to increase offensive pressure while Ukraine struggles to replenish depleted war stocks.

Economically, a U.S.-Iran war has introduced sharp volatility into global energy markets, with effects that seem likely to favor Russia's war effort in the short run. Iran accounts for a modest but meaningful share of world oil production, and its exports flow primarily to China. The conflict has disrupted Iranian output, damaged export terminals, and led to attempts to close the Strait of Hormuz, through which roughly one-fifth of global oil and liquefied natural gas transits. Even limited

disruptions have historically driven prices sharply higher, and a major conflict could push oil well above \$100 per barrel for an extended period. As the world's second-largest oil exporter, Russia stands to gain significantly from this surge. Higher revenues will help offset the impact of Western sanctions, providing additional funds to sustain high levels of defense spending, recruitment bonuses, and industrial production tied to the war in Ukraine.

Russia's economy, already showing signs of slowdown and projected to grow only modestly in 2026, depends heavily on energy exports for a large portion of federal budget revenue. A sustained price spike would destroy hopes in Western capitals of financially strangling Moscow through price caps and would enable the Kremlin to continue funding its military operations at current or even elevated levels. At the same time, Europe, Ukraine's most important financial backer, would suffer from higher energy costs and the threat of shortages, potentially triggering recessionary pressures that would reduce public and political willingness to maintain generous aid packages. In this scenario, Russia would enjoy a fiscal windfall while its adversaries would face mounting domestic economic strain.

The picture becomes more complicated over the longer term. If the conflict ends with regime change in Tehran and the lifting of sanctions on Iranian oil, global markets could be flooded with cheaper crude, eroding Russia's competitive position in Asian markets and squeezing its revenues. Of course, it would take considerable time to expand Iranian output, especially if its oil and gas infrastructure sustains major damage from military activity. A drawn-out war without clear resolution would align more closely with Russian interests, delivering prolonged high prices without the immediate risk of a post-conflict oil glut. In either case, the initial economic boost would give Moscow greater flexibility to prolong its campaign in Ukraine.

The military supply relationship between Russia and Iran adds another layer of complexity. Since the early stages of the Ukraine war, Iran has supplied Russia with large quantities of drones, artillery shells, and technical expertise, enabling sustained long-range strikes against Ukrainian cities and infrastructure. For Ukraine, any reduction in the

flow of Iranian-origin weapons would represent a meaningful tactical advantage, forcing Russia to rely more heavily on domestic production or alternative suppliers such as North Korea.

While Moscow places great store in its robust relationship with Iran, Ukraine matters far more to it. For Russia, its relationship with Iran is of strategic importance, while the war in Ukraine is seen as an existential issue. Therefore Russia is avoiding direct military involvement in any new war in the Persian Gulf region, preferring to intensify its efforts in Ukraine instead and so reap the benefits of Western strategic distraction.

A war in Iran benefits Russia in the near term by diverting Western military aid, boosting Russia's energy revenues, and reducing international pressure on its policy in Ukraine. These advantages may allow Moscow to increase the tempo of its military campaign in Ukraine. Over the longer horizon, however, the impact on Ukraine would depend on how the conflict ends. A rapid regime change in Iran that opens Iranian oil markets or leaves Russia without a key partner would impose serious costs on Moscow and boost Western leverage in Ukraine. A new prolonged quagmire in the Middle East, by contrast, would entrench Russian gains in Ukraine by distracting the West and keeping it economically and politically overstretched. The two theaters of conflict would thus be deeply intertwined, and developments in one theater would strongly influence the trajectory of the other. In a time of cascading crises, war in the Persian Gulf will more than likely exert a decisive impact on the war in Ukraine. *

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HORMUZ AND THE GLOBALIZATION OF THE WAR



by Ehud Eiran

The war between Israel and the United States against Iran began much like the summer 2025 conflict: a campaign of airstrikes and targeted killings directed at Iran, met by Tehran's missile response, though this time against a larger set of states. Yet within days, the strategic center of gravity shifted. The decisive arena, as these words are being written, is no longer the air domain, but the narrow waters of the Strait of Hormuz.

This shift has transformed the nature of the conflict. What began as a regional war, albeit one involving a global power alongside a regional ally, has evolved into a global crisis. This transformation has occurred not because additional states formally entered the fighting, but because global maritime energy flows have been disrupted. Roughly one-fifth of global oil and significant volumes of other energy products such as liquefied petroleum gas and liquefied natural gas transit Hormuz. In some weeks, the volume was even higher. UNCTAD data indicates that in the week preceding the war, 38% of global oil trade passed through the Straits.

Today, shipping traffic has collapsed. United Nations Trade and Development (UNCTAD) data illustrate the speed and scale of disruption. On the last day before the war (February 27),

141 vessels transited the Straits. One week later, on March 6, that number had collapsed to just five vessels. By March 16, according to the International Maritime Organization (IMO), there had been 17 incidents of attacks and (possibly) damage from sea mines. Seven seafarers were killed, and a number are unaccounted for or injured. Moreover, more than 20,000 seafarers were stranded aboard hundreds of vessels awaiting passage, as major carriers suspended operations. The some 90 vessels (including oil tankers) that have crossed the Straits with Iranian approval since the war began, did not prevent global oil prices from surging.

The closure of the Straits was a long-feared scenario. For decades, analysts warned that confrontation with Iran could trigger a chokepoint crisis, transforming a regional Middle Eastern conflict into a global economic shock, most notably in 1973, and to a lesser extent in 2025.

The maritime domain has become the principal mechanism through which the war has been globalized. Commercial shipping does not require a formal blockade to cease functioning. It is sufficient that insurers withdraw coverage, that shipowners judge transit too dangerous, and that crews refuse to sail.

This transformation has a potential to create strain within the U.S.-Israel alignment. Washington's primary concern is now the reopening of the strait and the stabilization of

global flows. Israel remains focused on degrading Iran's nuclear and ballistic missile capabilities, while hoping to create the conditions for regime change. These are not mutually exclusive objectives, but they are not identical. As the conflict globalizes, the divergence between American systemic priorities and Israeli regional priorities becomes more pronounced, potentially complicating alliance coordination.

At the operational level, the conflict reflects a broader transformation in maritime warfare that has been unfolding for a number of decades now. The battlespace is no longer defined by fleets maneuvering for sea control. Rather, it is shaped by the integration of land-based strike systems into the maritime domain. Iran has deployed naval mines, unmanned aerial systems, anti-ship missiles, mini submarines, and fast attack craft to create a dense, layered threat environment across a confined space. The objective is not to command the sea, but to deny it: to render its use prohibitively dangerous.

This form of denial has evolved. Beyond mines and small boats, used during the Tanker War in the 1980s and again playing a crucial role today, Iran also employs precision-guided munitions, persistent surveillance, and low-cost unmanned systems, enabling sustained pressure on maritime traffic. A substantial deployment of U.S. naval assets could likely reopen the Straits, but doing so would entail a deterrence-escalation dilemma: restoring freedom of navigation would require introducing additional forces into the theater while accepting a heightened risk of further direct engagement and, no less importantly, potential losses.

Iran acted more cautiously in the late 1980s, because it was engaged then in a large-scale war with Iraq. Now it appears that Tehran is willing to take greater risks. This shift may reflect a perception that regime survival is at stake. It also reflects a broader strategic pattern: in asymmetric maritime conflicts, weaker actors positioned near chokepoints can impose disproportionate costs on materially superior adversaries and targets. Iran, the Houthis, and

even Somali pirates have all exploited this logic in different contexts.

The implications extend beyond the Gulf. The maritime domain enables horizontal escalation. U.S. and Israeli strikes on Iranian vessels outside the immediate theater (in the Caspian Sea and near Sri Lanka) demonstrate that the battlespace is no longer geographically bounded.

This feature means that more actors may get involved. President Trump called on other nations to assist in opening the straits. Similarly, Iran's targeting on March 19 of a refinery at the port of Yanbu, on the Red Sea, may compel China to weigh more seriously its position in the conflict. The port serves as the exit point of the only major pipeline that bypasses the Gulf by linking Saudi oil infrastructure directly to the Red Sea. It is also the site of a Chinese-majority-controlled joint venture with Saudi Aramco, the Yanbu Aramco Sinopec Refining Company (YASREF), which was not attacked. The project represents an investment of approximately USD 8.6 billion. Another actor is India. It depends on energy from the region, and indeed some India-bound tankers were allowed to pass. It is also concerned because some 10 million of its nationals work in the Gulf. India had further quietly signaled its displeasure with the sinking of the Iranian Navy ship Dena near Sri Lanka on March 4, following its participation in an Indian-hosted exercise. *

EHUD EIRAN

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TURKEY'S STRATEGIC CAUTION ON IRAN

WHY ANKARA STILL SEES CONTINUITY IN TEHRAN AS LESS DANGEROUS THAN AN UNCERTAIN TRANSITION

Credit: Reuters



by Dr. Hay Eytan Cohen Yanarocak

When missiles fall near Turkish territory, the expectation is usually clear: Ankara will answer with forceful rhetoric, calibrated signaling, and an emphatic defense of sovereignty. Yet when the source of that threat is Iran, Turkey's response reveals a deeper strategic paradox. Even as Tehran tests Turkish red lines, Ankara remains reluctant to embrace any scenario that could bring about the fall of the Islamic Republic. This is not because Turkey trusts Iran, nor because it is indifferent to Iranian pressure. It is because, in Ankara's view, the collapse of the current order in Tehran could produce a regional realignment far more difficult to manage than the uneasy status quo now in place.

On March 20, air raid sirens blared for the fourth time near İncirlik Air Base in Adana, southeastern Turkey. While the Turkish Ministry of Defense dismissed the event officially as a false alarm, social media reports of an explosion suggest authorities may be concealing a kinetic event to avoid the political pressure of responding to a sovereignty violation.

In the immediate aftermath of the incident, a written statement attributed to Iran's new Supreme Leader, Mojtaba Khamenei, dismissed the missile attack against Turkey as a "false flag" operation and pointed the finger at Israel, even as Ankara denied the attack had taken place at all. Khamenei's framing, however, sat uneasily alongside earlier statements by Turkish Foreign Minister Hakan Fidan, which made clear that Ankara understood Iran was the true source of the ballistic missile fire.

This follows a similar incident on March 13, occurring just one day after Ankara reaffirmed that İncirlik remains under absolute Turkish authority despite the American presence. Tehran's recent provocations, however, increasingly challenge that narrative. The strike on Adana followed earlier reported missile incidents involving Hatay on March 4 and Gaziantep on March 10, both of which were intercepted by NATO air defense systems. After the first episode, Turkish officials appeared to favor strategic ambiguity, with reports suggesting that the missiles may have been intended for Cyprus rather than Turkey itself. But Iran's subsequent actions, including drone attack on Azerbaijan, made that posture increasingly difficult to sustain.

Through active telephone diplomacy, Turkish President Recep Tayyip Erdoğan appears to have encouraged Azerbaijani President Ilham Aliyev to exercise restraint, while Baku reserved its right to respond at a later stage. Even so, the broader message of recent days is unmistakable: Iran has demonstrated a willingness to test the patience not only of Israel, but also of neighboring states that have thus far sought to remain outside the core of the confrontation.

This places Turkey in an increasingly uncomfortable position. On March 11, Erdoğan warned that "those who reach out a hand against Turkey will have their hands burned, and those who speak against Turkey will have their tongues burned." Such language may serve domestic political purposes, but it also narrows Ankara's diplomatic room for maneuver. Once public red lines are drawn, a government must respond in a manner that preserves deterrence without inviting a wider escalation.

Yet Turkey's likely course of action remains uncertain. That uncertainty is not merely the product of the present crisis. It is rooted in a much longer historical pattern. Turkey and Iran — and before them, the Ottoman and Safavid empires — have not fought a direct conventional war since the Treaty of Zuhab in 1639. Their rivalry has endured for centuries, but it has generally been managed indirectly, through competition in Iraq, Syria, and the Caucasus rather than through open warfare across their shared frontier.

This historical legacy helps explain why Ankara remains wary of any scenario that could bring about the sudden collapse of the Iranian regime. Even when confronted with Iranian actions that challenge Turkish sovereignty, Ankara appears reluctant to endorse a broader project of regime change in Tehran. This position should not be mistaken for sympathy toward the Islamic Republic. Rather, it reflects a sober if controversial calculation: the alternatives may be even more destabilizing than the current order.

At the heart of this calculation lies a broader trend where Turkish foreign policy often prioritizes Neo-Ottomanist and Pan-Islamist ideologies over strictly national interests. This approach operates within a self-constructed illusion of an "Israeli threat." By opposing the collapse of the Iranian regime, Ankara pursues a strategy that is rooted in a flawed premise yet has evolved into a form of pseudo-realpolitik. As can be recalled since the Hamas attacks of October 7, 2023, and the war that followed, relations between Ankara and Jerusalem have deteriorated sharply. Over the course of 2025, Turkish rhetoric increasingly portrayed Israel not merely as a rival state, but as a central strategic challenge. Within that framework, many in Ankara appear to believe that a post-Islamic Republic Iran would be more open to cooperation with Israel and the West, thereby reshaping the regional order in ways unfavorable to Turkey.

From Ankara's perspective, such an outcome could contribute to a new geopolitical alignment linking the new Iran more closely with Israel, Greece, Cyprus, the United Arab Emirates, and India. Turkish officials and analysts have long warned against what they see as a pattern of strategic encirclement. In that sense, the current Iranian regime — despite its ideological distance from Turkey and its increasingly assertive behavior — may still be viewed as a familiar and, in some respects, containable actor within an imperfect regional equilibrium. Moreover, given Turkey's deepening ties with Russia and China in recent years — especially regarding BRICS and the Shanghai Cooperation Organization — Ankara is left questioning how long the West will continue to tolerate its divergent policies once a regime change occurs in Iran.

There is also a broader question of Turkey's place in Western strategy. Since 1979, Ankara has often benefited from being seen as a uniquely important Muslim-majority NATO member: at times difficult, but nonetheless indispensable. A future Iranian government seeking normalization with the West could dilute

that perception. For Turkey, the emergence of another large, historically consequential, Muslim-majority state eager to rebuild ties with Washington and Europe would inevitably affect its own relative leverage in transatlantic policymaking.

Such a shift would have implications beyond diplomacy. If Iran were no longer the principal focus of Western concern regarding authoritarian governance and regional destabilization, greater scrutiny could fall on Turkey's own democratic trajectory, institutional balance, and treatment of political opposition. At a time when the Turkish domestic political climate is already under close observation, such a reorientation of Western attention would not be insignificant.

Turkey's concerns, however, are not confined to matters of alignment and influence. They are also shaped by the experience of the Syrian civil war. Between 2011 and 2024, Turkey hosted more than four million Syrian refugees. Although the Erdoğan government initially framed this policy in humanitarian and religious terms, the domestic social and economic consequences were profound. Housing pressures intensified, low-skilled labor markets came under strain, and anti-refugee sentiment deepened across much of Turkish society.

That experience weighs heavily on Ankara's thinking today. Turkish officials are likely concerned that a sudden collapse in Iran could trigger a new refugee flow toward the Turkish border, especially if regime loyalists, vulnerable minorities, or civilians caught in transition sought to leave the country. In such a scenario, Ankara might consider some form of border security or humanitarian containment mechanism in order to prevent large-scale displacement from spilling directly into Turkish territory.

A further – and perhaps even more sensitive – concern is the Kurdish question. Turkish policymakers are acutely aware that major political change in Iran could create new opportunities for Kurdish political mobilization

in Iranian Kurdistan, or Rojhilat. Given the symbolic place of that region in Kurdish political history – including its association with the short-lived Mahabad Republic of 1946 – developments there would be followed very closely in Ankara.

From the Turkish perspective, the issue is not confined to Iran alone. A reconfiguration of state-Kurdish relations in Iran could affect Kurdish political expectations across the wider region, including in Iraq, Syria, and Turkey itself. It is in this broader context that Ankara's own Kurdish policy initiatives in recent years should be understood: not only as matters of domestic security, but also as part of a wider effort to manage the possible regional consequences of upheaval beyond Turkey's borders.

For all these reasons, Turkey's policy toward Iran is often read too narrowly. Ankara's caution does not necessarily reflect trust in Tehran, nor does it imply comfort with Iranian assertiveness. Rather, it reflects a strategic judgment that the collapse of the current order in Iran could unleash a chain of consequences – geopolitical, demographic, and political – that Turkey would find difficult to contain.

This does not mean Turkey can absorb Iranian pressure indefinitely. Missile strikes on or near Turkish territory, whatever their intended target, place real stress on Ankara's long-standing preference for calibrated ambiguity. The more direct the threat becomes, the harder it will be for Turkey to preserve the distinction between strategic caution and strategic passivity.

That is the essence of Ankara's dilemma. Turkey seeks to deter Iranian encroachment without encouraging a broader unraveling of the regional order. It wants to defend its sovereignty without opening the door to a post-regime scenario in Tehran that could weaken its strategic position, intensify refugee pressures, and reshape the Kurdish question across the region.

In the unfolding 2026 war – marked by operations such as “Roaring Lion” and “Epic Fury” – Turkey is therefore confronting two

imperatives that do not sit easily together. The first is the need to respond credibly to direct threats. The second is the desire to preserve a regional balance that, for all its dangers and contradictions, may still appear in Ankara less perilous than the uncertainties that could follow the fall of the Islamic Republic.

For Turkey, then, the issue is not whether Iran poses a threat. It plainly does. The real question is whether the collapse of the Iranian regime would produce a more stable neighborhood – or a far less predictable one. For now, Ankara appears to have reached its conclusion: a contentious but familiar Tehran may still seem preferable to a transformed Iran whose consequences no one can fully foresee. *

DR. HAY EYTAN COHEN YANAROCAK

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Credit: Reuters



by Paul du Quenoy

“Who needs allies?” asked the cover of *Foreign Affairs* last summer. Adorned by an American Eagle, the title question was intentionally sarcastic, implying that American foreign policy simply cannot proceed alone. The issue’s contents, authored by a tired round-up of familiar names from the former foreign policy establishment, either derided notions of American unilateralism outright or “raised concerns” about its possible pitfalls as it reasserts itself in President Trump’s second term. The piece made for depressing reading but repeated a generation-long insistence that a multipolar world has replaced or is destined to replace a fleeting unipolar moment of American hegemony.

Ideological attachment to multipolarity is strong and multifaceted. Liberal internationalists champion it as a desirable model for managing an American national decline that they assume is inevitable and overdue as shifting economic patterns, perceived national weaknesses, altered establishment priorities, and an aversion to military solutions accommodate what they see as the rise of new centers of power. Anti-American forces celebrate multipolarity as just desserts for what they resent as an overly assertive American

hegemony that might be challenged by potential new poles of power and their rogue client states in the developing world. Institutional globalists advocate multipolarity as an ideological framework for containing American wealth and power within international institutions largely led by third world bureaucrats empowered to redistribute it. Some traditional conservatives find comfort in multipolarity because it veers away from neoconservative adventurism, allows for a domestic retrenchment of attention and resources, and offers to restore a familiar nineteenth-century-style balance of power system that they find comforting. Academic specialists in international relations often advocate multipolarity in a broader historical context, viewing American hegemony as a fundamentally ahistorical moment that was artificially inflated by the power vacuum that followed the devastation of World War II and briefly extended by the collapse of the Soviet Union.

But as different as these approaches are, as of the mid-2020s – and likely far into the future – their common conclusion has proved embarrassingly elusive, consistently flawed, based on limited or misleading data, and ultimately simply incorrect.

To begin with only the most obvious deficiency in theorizing the emergence of a multipolar world, no new poles of international power have emerged in the decades since they were first envisioned in such acclaimed studies

as Paul Kennedy’s *The Rise and Fall of the Great Powers* (1987) and Henry Kissinger’s *Diplomacy* (1994), accessible, bestselling books penned around the end of the Cold War by U.S.-based but foreign-born luminaries that virtually anyone drawn to international relations eagerly read, usually without skepticism or critique. Both of those studies, and many in between, expounded the same general argument: Global hegemonic status is fleeting, unsustainable, and, arguably, morally wrong. Losing global hegemony is inevitable, realistic, and, arguably, morally just. The only people who would try to arrest self-evident and praiseworthy hegemonic decline are belligerent ignoramuses whose obtuse greed and misguided patriotism would condemn themselves and the world to a cataclysmic war that had to be avoided at all costs, and that could be avoided by leaders wise and self-effacing enough to break the cycle of rise and decline. The best America could hope for in such a world was to abandon its traditional ethos of exceptionalism, graciously demote itself to one important power among several – alongside a resilient Japan, a revitalized Russia, an ever-closer European Union, a rising China, and (possibly) an assertive India, – and participate in the management of world affairs with humility guided by prescribed rules.

Breaking the previous cycle of hegemonic rise and decline sent the Washington mandarin on a feel-good quest to find or manufacture evidence to fit the theory: i.e. belief or information that America was in decline while other powers were ascending. Recall Barack Obama’s transparent rhetoric attempting to recast America as a “*primus inter pares*” on the world stage and his glib assertion that “American exceptionalism” was no more distinctive than “Greek exceptionalism.”

Some trends seemed to fit the multipolar picture, with scads of studies purportedly showing that American educational achievement, labor efficiency, investment rates, consumer habits, family values, mental health, cultural levels, civic-mindedness, and other

indicators of national greatness were not merely in absolute decline, but in decline relative to those of the supposedly rising powers. Dire warnings in the 1990s about how many hours Japanese students spent studying overlapped with scolding ranking systems of the 2000s that boasted of European prowess in elementary school mathematics before yielding in the 2010s to tall tales of the massed brilliance of Chinese engineers. America’s share of global GDP, which reached as high as 50% at the end of World War II, experienced relative decline as other economies recovered in the postwar decades. On that basis, it was intuited to decline further as smarter, leaner, and more efficient rivals grasped at the hegemonic mantle. Military misadventures in Afghanistan and Iraq, the latter of which was notably carried out “without allies,” suggested that American strategic vision was wasteful, corrupt, and ultimately hapless, especially in cases when it departed from the “rules-based” international order that establishment thinking believed it was destined to follow.

Yet for all the elite handwringing, none of the other potential poles ever rose far or fast enough to become a viable alternative to American hegemony.

Despite Kennedy’s prediction that Japan and its hardworking youth would replace the United States as the world’s next hegemon, it instead spent the 1990s stagnating into near irrelevance beyond its decades-long American alliance and trade relationship.

Russia’s post-communist revitalization pulled it out of chaos, buoyed almost entirely by periods of high energy prices, but its economy ranks lower than Spain’s, its population remains smaller than Bangladesh’s, its military operations within the former Soviet Union have been challenging and inconclusive third-world affairs, and its power projections beyond former Soviet space have almost all vanished. As we have seen in recent months, Moscow – which had already been unable to save its leftover Cold War clients in Iraq, Yemen, and Libya – could

barely utter a word of opposition as its next generation of clients in Damascus, Tehran, and Caracas fell or were kneecapped by resurgent American power. Even within former Soviet territory, conflict resolution has become a matter for Washington. American negotiators are parlaying the ongoing peace talks in Ukraine, where foreign minister Andrii Sybiha recently said “Only Trump can stop the war.” Trump also quickly resolved almost 40 years of near-war conditions between Armenia and Azerbaijan, lands that had been under Russian control or influence for centuries but whose leaders in 2025 agreed that the President of the United States should win the Nobel Peace Prize for ending their conflict.

Despite fervent hopes and confident predictions, the European Union remains a bureaucratic Frankenstein, with 27 constituent parts of varied histories, cultures, traditions, and interests jostling for an ever-elusive consensus. Its supranational institutions in Brussels and Strasbourg suffer from a self-confessed “democratic deficit,” which leaves millions of Europeans in resentful disenfranchisement and ever more drawn to nation-state models of authority. Any member-state can veto continent-wide legislation. History was made in 2016 when Britain voted to abandon the project altogether, with increasingly powerful political movements in many other EU countries advocating nationalist solutions of varying urgency.

European economics is largely an affair of abstruse and often unaccountable central planning. Its broadly leftist-governed institutions led the continent’s promising postwar recovery into a morass of stagnant growth, bureaucratic overregulation, low entrepreneurialism, chronically high unemployment, and an unprecedented migrant crisis that its traditional elites seem unable or unwilling to control. Eighty years of protection by America’s nuclear umbrella created an intergenerational culture of security dependency characterized by embarrassingly

small national defense budgets, militaries of marginal significance, supply chains that frequently and in many cases irreplaceably lead back to American defense contractors, and high obstacles to intra-EU defense cooperation. Establishment insecurity in Europe drives both an unconvincing claim to the moral high ground and a crackdown on speech and expression critical of the status quo – two postures that rarely complement great power status.

China, with growth rates long predicted to overreach America’s, has slowed down to stagnation, with an authoritarian leadership solidifying control across national life. Even a more robust China capable of creating durable economic relationships around the developing world never succeeded in building the military and security structures to safeguard those positions, protect its trade routes and supply lines, or defend its rogue anti-American states in the face of U.S. power. China’s main geopolitical aspiration – reconquering Taiwan – has remained elusive for nearly eight decades and seems impractical without at least another generation of military development. And even then, all a successful recapture of the strategic island would do – especially in light of Trump’s reshoring of strategic tech industries there – is breach the first island-chain barrier of the mainland’s containment, a development that would almost certainly invigorate already strong regional defense arrangements oriented toward the United States.

“America Forever” may sound quixotic in our 250th year, but in our unipolar world there would be little point to exclaim anything else. *

— PAUL DU QUENY

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Credit: Bastiaan Slabbers/Sipa USA via Reuters Connect

JOSH SHAPIRO, ISRAEL, AND THE RACE FOR THE WHITE HOUSE



by Jacob Heilbrunn

With his Iran war, or, if you prefer, excursion, President Trump is upending political debate in America on the right. The resignation in March of Joe Kent, his director of the United States National Counterterrorism Center, has inflamed disputes about the origins and course of the war. In his resignation letter, Kent suggested that Trump had been inveigled into starting the war and that it was Israel, and Israel alone, that had done the inveigling. “I cannot in good conscience,” Kent wrote, “support the ongoing war in Iran. Iran posed no imminent threat to our nation, and it is clear that we started this war due to pressure from Israel and its powerful American lobby.”

The perception of Israel as a malignant force in American politics is not confined to the right. It has also been growing among Democrats who were critical of President Biden’s approach toward Israel and its war in the Gaza Strip. The revolt against that approach may have helped to impede, if not shatter, former vice-president Kamala Harris’ run for the presidency in 2024, when she campaigned against Trump. It has been widely speculated that Israel will form a key issue in the upcoming primaries for the 2028 Democratic nomination for the presidency. California Governor Gavin Newsom, for example, has recently referred to Israel as an “apartheid state” and stated that he will accept no contributions from the American Israel Public Affairs Committee.

One Democrat who has remained unwavering in his support for Israel is Pennsylvania Governor Josh Shapiro. Shapiro, whom Harris considered appointing as her running mate in 2024, seems likely to run for the presidency, Shapiro has managed to transcend partisan decisions, for the most part, in Pennsylvania—his ability to do so forms the keystone of his potential appeal as a presidential candidate who can unite America after a prolonged period of division. Nor is it lost upon Democrats that they must win Pennsylvania in order to obtain the presidency.

In March, Shapiro appeared on HBO’s “Real Time” host Bill Maher’s show. Maher said, “Sounds like you’re well on your way to the nomination.” Shapiro responded, “I refuse to take any of your bait here.”

Does he in fact view himself as presidential timber? One sign of Shapiro’s ambitions is that, like Newsom and Harris, he has released a new autobiography called *Where We Keep the Light: Stories from a Life of Service*. Shapiro is 52-years-old. Henry Stimson, the former Secretary of State and Secretary of War, was 71-years-old when he released his memoir, *On Active Service*, in 1948, two years before his death. Shapiro’s title may be somewhat grandiose, but there can be no denying that he has had to grapple directly with several grave events as Governor—one in Pittsburgh (where the Tree of Life Synagogue came under murderous assault), and another (an arson attack) that directly targeted him and his family in the Governor’s mansion. If anyone has an insight into the anti-Semitic threat that is coursing through America, it is Shapiro.

Shapiro, who was born in Kansas City in 1973, has a self-deprecating streak, noting at the outset of his memoir that he was a middling student in elementary school. Pivotal to reorienting his somewhat lackadaisical attitude towards his studies was discovering the plight of Soviet Jews. He began wiring a refusenik named Avi. Together with his mother, the 13-year-old Shapiro started a national group called “Children for Avi.” “The group,” Shapiro reports, “grew to dozens of people writing to him and on his behalf. My mom organized a trip to Washington, DC, where we got to sit down with Senator Arlen Specter and then-Senator Joe Biden among others to lobby for Avi and the other kids.” By 1986, Shapiro stood at Ben Sholom synagogue on a Saturday morning. “For me,” Shapiro writes, “I would later realize that these were the moments that helped lead me into a life of faith and public service.”

Another early experience that left a deep impression upon Shapiro was living in Israel for four months as a high school junior in the fall of 1989. “It was the first time I could feel faith,” Shapiro writes. “I could see it and touch it and it wasn’t abstract.” Upon returning to America in January 1990, he ran and lost a race for student body president, the only race that he has failed to win.

Things began to take a more auspicious turn when he entered the University of Rochester, where he successfully ran for the student Senate. He switched his major to political science from medicine and became an intern in his junior year on Capitol Hill for Michigan Senator Carl Levin. Shapiro seeks to underscore his pragmatism, recalling that working for Levin “showed me...that you need to be prepared for every possible question, every possible scenario, and you should always think through things from all angles, even when you believe you know where you will land on something. It is the fundamental underpinning of being a great leader. If you don’t ask the right questions and listen to the answers, you can’t make the right decisions.”

Shapiro went on to earn a law degree at Georgetown University. He became an associate at Ballard Spahr, a large law firm in Philadelphia, but chafed at the routine. Soon enough, he

launched a run in September 2003 for the state House of Representatives. His political odyssey had begun. The key to his steady rise was spending as much time as possible with his constituents rather than hobnobbing with legislators in the state capitol, Harrisburg. “In the seven years I served as state representative,” Shapiro writes, “I held more than a hundred town hall meetings for people in my district.”

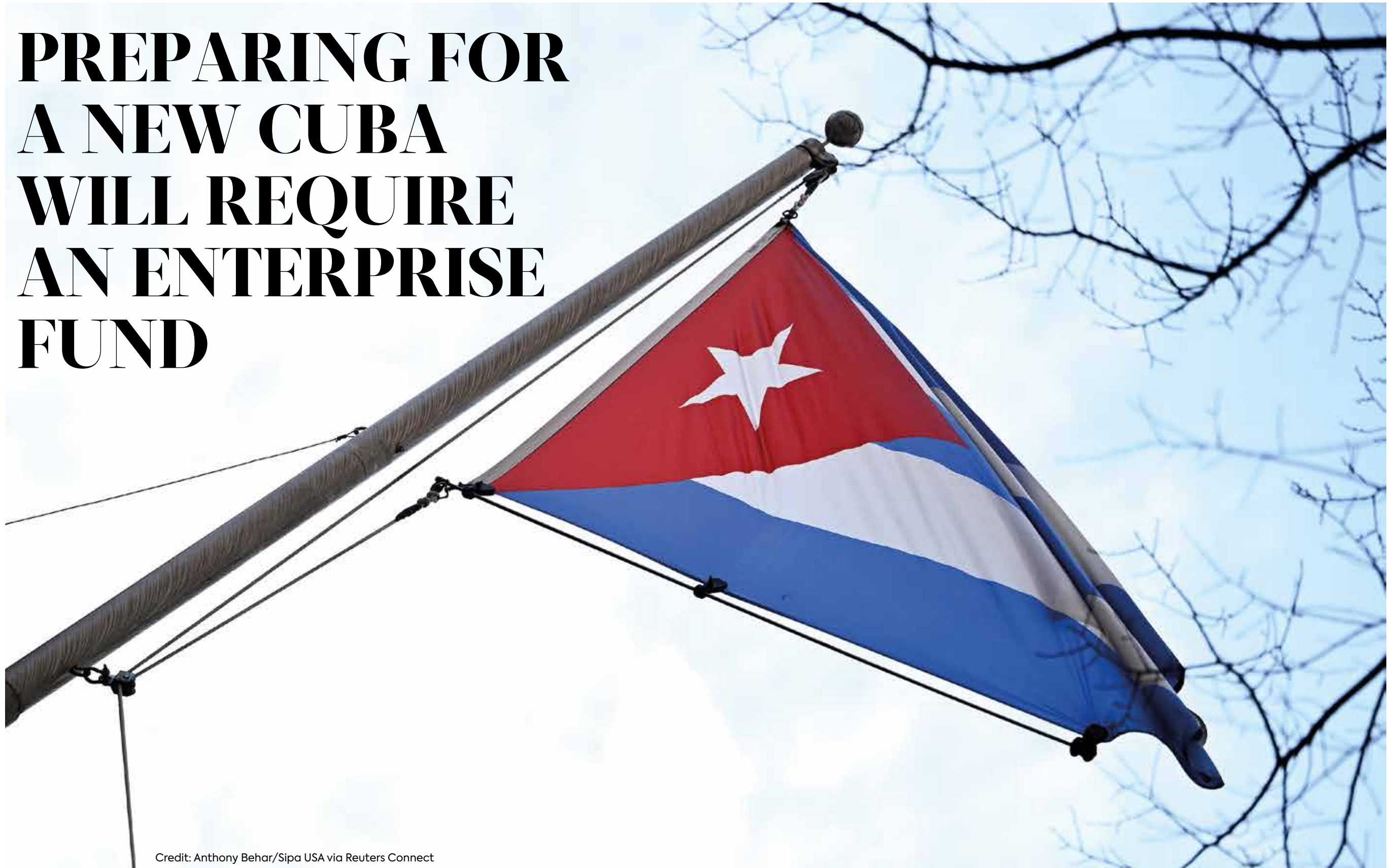
Shapiro’s steady ascent meant that the Harris campaign interviewed him at length. Shapiro makes plain his discomfort with Harris and her associates. He recalls that their questions were not about substance. Instead, “they were questioning my ideology, my approach my world view.” He adds, “it was their right to do so, but the manner in which they did suggested to me that they really didn’t understand where the people who would decide this presidential election really were.” In particular, he bridled at their queries about Israel and his criticisms of protesters at the University of Pennsylvania who had vandalized the campus and assaulted Jewish students. “I wondered whether these questions,” Shapiro writes, “were being posed to just me—the only Jewish guy in the running—or if everyone who had not held a federal office was being grilled about Israel in the same way.”

Since then, Shapiro has been in the forefront of urging Democrats not to abandon Israel. He has been road-testing the message that the Democratic Party must acknowledge that the Jewish state has a fundamental right to exist. Whether that message will prove politically salient is bound to be a central question in the 2028 presidential race. *

JACOB HEILBRUNN

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PREPARING FOR A NEW CUBA WILL REQUIRE AN ENTERPRISE FUND



Credit: Anthony Behar/Sipa USA via Reuters Connect



by Daniel Runde

For over six decades, Cuba has been viewed as frozen in time: a closed, sclerotic regime with an economy in perpetual crisis and a people forced to innovate for survival. That image is outdated. The regime is fragile, its command economy exhausted, and amid the intensifying 2026 energy crisis—severe blackouts, fuel rationing, and economic paralysis triggered by halted Venezuelan oil shipments following U.S. actions—change could arrive abruptly.

The question, then, is not whether Cuba will transform, but whether the United States and its partners will be prepared.

Recent history provides clear precedents for the prospect of turbulent change. In November 1989, the Berlin Wall fell overnight, leading to the demise of the Warsaw pact. Two years later, the Soviet Union officially abolished itself. Countries that transitioned successfully benefited from pre-planned U.S. toolkits for market integration, including one standout innovation: Enterprise Funds—publicly capitalized, privately managed vehicles that delivered risk-tolerant capital to small and

medium-sized enterprises (SMEs) in post-communist states like Albania, Ukraine, and Moldova when no one else would invest.

Cuba, like North Korea, is a relic of the cold war. But unlike North Korea, it does not have an outside patron in the form of China. Instead, it now faces a most uncertain future. If the regime should collapse, then Cuba would confront a comparable “starting from near-zero” scenario that took place in Eastern Europe after the fall of communism. Decades of central planning have hollowed out private-sector capacity: crumbling infrastructure (aging power plants, roads, ports, water systems), unreliable energy grids fueling nationwide blackouts, politically distorted productive sectors, and severe capital constraints. Traditional aid, technical assistance, or promises of future trade will not suffice to build a sustainable market economy. Early, catalytic investment is essential—capital willing to absorb political and regulatory risks while shaping a rules-based environment.

A Cuba Enterprise Fund should be designed now to target economically critical and politically stabilizing sectors:

* Energy: Modernize generation and transmission, invest in renewables, and reduce dependence on imported fuel to end blackouts and economic paralysis.

* Tourism: Shift from low-value mass offerings to higher-value cultural, ecological, and historical experiences, financing Cuban SMEs so growth benefits families rather than elites.

* Aviation, logistics, and infrastructure: Upgrade connections to regional hubs, modernize roads, ports, water, and sanitation to crowd in larger capital pools.

* Agriculture: Revitalize production to cut food imports, build resilience, and enable high-value exports integrated into global markets.

* Digital infrastructure: Support broadband and fintech for leapfrog opportunities with high returns from targeted capital.

These funds excel where grants fall short: providing patient, risk-tolerant capital to seed SMEs and local banking; modeling transparent governance and anti-corruption standards in crony-ridden settings; and operating with independent, professional management insulated from political interference. They blend public and private resources, demonstrate viable business models, de-risk early bets, attract diaspora capital through co-investment, and condition financing on reforms for transparency and enterprise freedom.

Timing is critical. Waiting until after regime change wastes the narrow window when political will and attention are highest. Begin planning now: define governance structures, outline sector priorities, assess capitalization ranges, and address legal/sanctions constraints. The fund can remain inactive until political and legal triggers are met, but starting the homework late risks missing the moment.

The Cuban diaspora could play a central role, contributing capital, managerial expertise, networks, and local knowledge. A structured fund amplifies their impact by enabling pooled, professional investments. International partners—Latin American democracies, European allies, and regional development banks—can rally around a U.S.-anchored fund for coordinated, non-fragmented support.

Cuba’s transition is a strategic imperative, not merely humanitarian. A stable, prosperous,

market-oriented Cuba would reshape Caribbean and Latin American dynamics, reduce migration pressures, and diminish authoritarian influence.

The United States faces a choice: react ad hoc as events unfold, or prepare deliberately. The Trump Administration’s de facto blockade of Cuba appears to be imposing severe costs upon the Cuban regime. It would do well to plan now for a Cuba Enterprise Fund—a proven, practical instrument to help Cuba emerge as a freer, more stable, and prosperous neighbor. Creating a free and prosperous Cuba would not be a victory for Trump. It would be a triumph. *

DANIEL RUNDE

Daniel F. Runde is the author of *The American Imperative: Reclaiming Global Leadership Through Soft Power* (Bombardier Books, 2023).

U.S. President Donald Trump and Japanese Prime Minister Sanae Takaichi deliver a speech aboard the nuclear-powered aircraft carrier USS George Washington in Yokosuka, Kanagawa Prefecture, Japan, on October 28, 2025.

WHY TRUMP'S CHARM OFFENSIVE IN JAPAN WORKED





by Daniel J. Samet

Your Sunday probably wasn't as good as Sanae Takaichi's. The Japanese prime minister romped to victory in her country's general election, which handed the Liberal Democratic Party its biggest majority ever in the House of Representatives.

President Donald Trump, who had endorsed Takaichi, sent his congratulations and called her "highly respected and very popular" in a social media post. The results in Japan demonstrate that a Trump endorsement doesn't always doom a leader's campaign. Rather than bestow a "kiss of death," his forays into elections can advance American interests overseas.

Takaichi was unafraid to embrace Trump. Just one week after becoming prime minister in October, she spoke alongside him from the aircraft carrier USS George Washington. She seemed to enjoy the pomp and circumstance, beaming and pumping her arm as the crowd of service personnel cheered. Following his endorsement a few days ago, Takaichi wrote that she was "sincerely grateful to President Donald J. Trump for his warm words." At the very least, Takaichi's relationship with Trump did not damage her at the polls. What's more, Trump's encomium testifies to his enthusiasm for her.

Takaichi's win is a win for the United States. "We will confirm the unshakable unity between Japan and the U.S., while advancing broad Japan-U.S. cooperation in diplomacy, economics, and security," the pro-American prime minister said Monday. She has refused to kowtow to Beijing and is expected to pursue a much more assertive defense policy than her predecessors who refused to recognize that China's regional ambitions pose a direct threat to Japan. A Japan that can better deter China is a boon to American security and prosperity.

Trump's election interventions haven't always paid off. On the contrary, they were counterproductive in Canada. After winning a second term in November 2024, Trump ridiculed the Canadian prime minister as "governor" Trudeau and said repeatedly that he wanted Canada to become the 51st state.

Inhabitants of the Great White North took exception to Trump's brickbats. Rather than beget Canadian statehood, they harmed the Conservative Party and its leader Pierre Poilievre, who had previously enjoyed a considerable polling lead over the Liberal Party. In March 2025, Trump implied that he'd welcome a Liberal Party election victory, saying "I'd rather deal with a liberal than a conservative." He also criticized Poilievre and called him "no friend of mine." Trump got his wish the next month, when Mark Carney, who had succeeded Trudeau as prime minister, led

the Liberals to a remarkable comeback victory. Trump's behavior hurt Poilievre and helped Carney.

The president was his own worst enemy. Canadians are acutely aware that they're overshadowed by Americans. They also resent American arrogance, real or imagined, and treasure their independence. If his intention was to assist the politician more favorable to the United States, Trump's ventures into Canadian politics backfired mightily.

This was tragic for North America's two most developed countries. Canada squandered the chance to elect Poilievre, who had the right answers for its ills: tax cuts, deregulation, and sane social policies. Instead Canadians are getting more of the same under Carney. Their country suffers from a widening GDP per capita gap with the United States and little to no economic growth, not to mention "progressive" policies on euthanasia and drugs.

Carney's victory has also harmed the United States. Most egregiously, he has courted China as an economic partner. During his trip to Beijing in January, Canada and China struck a deal cutting Canada's 100 percent tariff on Chinese electric vehicles to 6.1 percent. Washington took it poorly. "Canada is systematically destroying itself," Trump stated in his typically understated way. "The China deal is a disaster for them. Will go down as one of the worst deals, of any kind, in history." Secretary of Transportation Sean Duffy said that Canada would "surely regret" the agreement, while U.S. Trade Representative Jamieson Greer also criticized it.

If Canada keeps tilting toward China, it will augur poorly for Washington. A major strength of American foreign policy has been forging partnerships and alliances with Asian countries that can check China's regional ambitions. Beijing is trying to give the United States a taste of its own medicine in the Western Hemisphere. The more influence China has in Canada, the worse for America.

If only Poilievre were in charge. In 2024, he slammed China for its predatory industrial

policies. "They have stolen technology from western countries, limited access to global supply chains and have massively subsidized steel, aluminum and EV industries," Poilievre said of the Chinese. "They're doing this with the goal of crushing our steel, our aluminum and our automotive production and taking our jobs." More recently, he has rebuked Carney for his agreement with Beijing, arguing that is "jeopardizing our security and auto jobs." Trump could have had a friendlier prime minister with a clear-eyed view of China on America's northern border.

It need not be like this. Before his presidency ends, there will be more opportunities for Trump to weigh in on foreign elections. If Trump embarks upon a charm offensive, as he did in Japan, he can have a salutary impact on them. His critics would do well to take note. *

DANIEL J. SAMET

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AMERICAN SECURITY INTERESTS IN ASIA

U.S. President Trump at Yokosuka base Credit: Kyodo via Reuters Connect



by John J. Hamre

Japanese Prime Minister Sanae Takaichi took a calculated gamble to call for elections only four months into her tenure. The Liberal Democratic Party was in deep trouble with the Japanese electorate. While LDP objectionable behavior seems modest compared to European or US values, it represented an arrogance by the LDP that deeply offended Japanese voters. So, Takaichi-sensei's snap election was a risky gamble. But she sensed the electorate wanted strong leadership. She stood up to China's crude pressure campaign, which Japanese voters hugely appreciated. She brought the LDP back to a towering leadership majority in the Lower House. It confirms that Japan is ready for a larger role in Asia.

Historically Japan focused on commercial opportunity and diplomacy to engage Asia. Japanese politicians were happy to stand in the shadow of America's military posture. This started to change in the second Abe Administration. Abe charted a course to create new administrative structures for national security. When China reacted with harsh military demonstrations of missilery after the Nancy Pelosi delegation visited Taipei, it reinforced the view that Japan must invest more

in its military and take a larger role in the region. China's inept handling of Takaichi's comments about a cross-strait's crisis reinforced the view that Japan must focus on building a stronger military.

This is most welcome. Chinese security experts believe (and US Asian allies worry) that America is in strategic decline in the Pacific. The Trump Administration's national security strategy is troublingly ambivalent about China as a threat. The strategy expresses formulaic expressions demanding more military investment by allies. But there is no clear vision or understanding of the threat posed by China to America's security interests and the imperative for tangible actions in the Asia-Pacific region.

Our leading Asian partners—Japan, South Korea, Australia—see this. These countries want the US to maintain its security presence in Asia. They see the US as an essential counterweight to Chinese intimidation. To be a stronger partner to the US, each of these countries is making long-term commitments modernizing their security forces. They want America to remain an active and leading security partner in the Asia Pacific. But they see the lack of consensus within the US political establishment over national goals and purposes. They read an ambiguous national security strategy with no clear vision about Asia. They see the massive accumulating financial deficits and the fact that debt servicing today exceeds spending on national security in the US.

None of our security partners in the region have the depth to substitute for the United States as a security guarantor for the region. Herein lies the dilemma. Each is actively working to engage an ongoing US role in the region. Each partner country wants continued American military presence. Each country is making major investments in national security, in part to reassure America that they are committed to their own defense but also preparing for the possibility that the US will not stand up on their behalf to Chinese intimidation. Each is concerned that America lacks the political will in the long term to deter Chinese pressure. Each knows they have no option other than hoping the US will be there in a time of crisis.

The very strong support for Prime Minister Takaichi is therefore most welcome. She has been strong in standing up to the Chinese, but if the situation tips to confrontation, fortunately she has built a trustworthy relationship with President Trump. America is still the essential security power in the region and that should prove to be constructive in a crisis.

But this speaks to the near term. The longer-term situation is far more clouded. America's military is indeed strong and creative, as seen in the recent activities in Venezuela. But how strong can America be when it runs fiscal deficits of 7% a year, when politicians lack the will to address the looming crisis of insolvency for the Social Security system, when the Congress is balanced precariously on 2-3 votes with every difficult problem.

America once had a clear vision of its long-term security interests. We had a clear vision of the threat posed to our interests. We had a clear vision that was shared by our partners in Asia and in Europe. We understood the crucial role our allies played in constructing a fabric of mutual reassurance to resist Chinese and Russian intimidation. Our allies made themselves vulnerable by hosting US forces. Their countries would incur the destruction if war came. But it was worth the risk to have

America as a steady guarantor of security and peace. And it was hugely beneficial for the US to have them as security partners.

These former certainties are now in question. This heightens the value of Japan's evolution to a stronger and more focused security commitment. We are fortunate indeed that Takaichi won such a convincing election. But we need to see in this election the essential underlying dynamics. China is intent on dominating Asia. Our allies want to resist that. America is essential for this effort. For the foreseeable future, America will remain the essential security partner in Asia. We need a more thoughtful debate to reaffirm our commitment to a free and prosperous Asia. *

— JOHN J. HAMRE

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Credit: Oriental Image via Reuters Connect

CHINA'S COMING POPULATION CRASH SCRAMBLES THE GLOBAL BALANCE OF POWER



by Nicholas Eberstadt

Demography may not be destiny, but gradually—and unforgivingly—it does alter the realm of the possible in the world arena. One of the most important geostrategic consequences of current global demographic trends is playing out now in China, where depopulation is tightening the constraints on “China’s rise”.

An astonishing and generally unexpected birth crash is now underway in the PRC. It has already pushed China into population decline, and depopulation there stands only to accelerate over the coming generation. Tomorrow’s impending demographic realities, already visible today, will require us to revisit the now-familiar “China’s rise” narrative. Given the rapid aging and shrinking of the country’s population—by now inevitable—in the decades immediately ahead, this may not turn out to be the “Chinese century”, after all.

For thirty-five years—from 1980 through 2015—the Chinese state and the CCP that commands it enforced a harsh and coercive “One Child Policy” on the Chinese people. By the early 1990s, China’s fertility had fallen below the replacement level; two decades later, the Party concluded the country’s birth rates were actually too low. But when authorities finally suspended the program (note that population control was never actually scrapped: Beijing still insists that “births are a matter of state”) an amazing thing happened.

After a slight uptick in reported births in 2016, China’s fertility levels careened into a full-blown plunge. By 2023, China’s birth level was reportedly less than half as high as it had been

just six years earlier (18.3 million in 2016 vs. 8.9 million in 2023).

That sort of sudden, brutal decline is almost never seen in modern societies during times of orderly progress—rather, it tends to be characteristic of disaster, of reverberations from famine, pestilence, or wartime upheaval. Since it cannot be explained by obvious crisis, China’s recent “birth shock” may instead possibly speak to some radical shift in popular sentiment: perhaps a sharp swing away from optimism and into deep pessimism.

And the amazing PRC birth drop has not yet stopped. Last month Chinese authorities reported that the national birth level in 2025 fell below the 8 million mark (to 7.92 million births).

To put that number in perspective: it is barely two fifths of China’s birth total just nine years earlier. Further: China likely has not had such a low annual birth count since the 18th Century. And for a country of roughly 1.4 billion people, the 2025 birth total implies that China was almost 60 percent below the childbearing level needed for long term population stability as of 2025. If China were to maintain that 2025 birth pattern, there would be only 43 future daughters—and 18 future grand-daughters—for every 100 Chinese women of childbearing age today.

Thanks to this unexpected birth crash, China entered into population decline in the year 2021, joining the “net-mortality club” of societies where deaths outnumber births. The gap between deaths and births has steadily widened since then, and the country’s population decline correspondingly accelerated.

Even before the latest stunning birth drop, the UN Population Division was projecting that China would be tallying over 2.3 deaths for every live birth by the year 2050, and that total population would fall by over 150 million

between then and now. Given the continuing birth slump, the gap between deaths and births in China could prove to be even wider, and the population drop even more steep.

And this is just the overall “headcount” sounding. If we dig down, the implications look all the more unforgiving.

With less than half as many babies in 2025 as in 2016, China’s working age manpower is set on a crash course in the generation ahead: we can see this already, and there is very little Beijing can do to alter that trajectory. China’s 15-64 group peaked over a decade ago, but has only shrunk by about 1 percent since then. Now it is on track to drop by a quarter—perhaps even more—by 2050: that works out to a shrinkage in working age manpower of roughly a quarter billion men and women over the coming generation.

The 18-23 contingent—from whose ranks the PLA will draw its future recruits—stands to be less than half as large in 2050 as today. Indeed: by 2049—the 100th anniversary of its Communist Revolution—China may have fewer young men of military age than at the time of the 1949 “Liberation”.

And super-low fertility means that China will be going gray at an extraordinary tempo. Given that the overwhelming majority of Chinese who will be living in 2025 have already been born, there is relatively little surmise in these projections. By 2050, China’s median age is on track to hit 52 years. No country in history has ever been that gray—yet. That same year, nearly one in three in China will be 65 or older. One in ten will be over 80 by then, as well.

On their very face, these demographic trends all stand to compromise China’s economic performance, and to complicate Beijing’s quest to augment deployable international power. But things look even more serious when we consider what sustained super-low fertility means for China’s family structure.

With the rise of China’s “new family type”—only children begetting only children—we will be entering a Chinese future in which a growing proportion of the rising generations will lack not only siblings, but also cousins, aunts and uncles. The withering away of China’s extended family networks—the people’s only reliable social safety

net since the dawn of Chinese civilization—will surely have profound and far-reaching implications, few of them beneficial. And an only-child PLA also begs the question of casualty tolerance in any future international adventures the CCP may wish to contemplate.

To be sure: Beijing will try to compensate for these demographic headwinds, and it does have some potentially valuable options at hand. These include bulking up on popular education and training, going all-in on AI and robotics, and doubling down on other R&D efforts.

But the world is a moving target, and these same options will (at least potentially) be available to competitors, including the USA, that do not face the same severe demographic dilemmas.

Not so long ago, received wisdom held that it was only a matter of time before the Chinese economy surpassed America’s. Today growing numbers of observers doubt that crossover will ever take place. To be sure: with nuclear weapons and the world’s second largest economy (and population) for the foreseeable future, China is all but guaranteed a major role on the world stage. But demographic trends may have helped deny Beijing its shot at global primacy. *

— NICHOLAS EBERSTADT

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BASING U.S. NAVY VESSELS IN THE INDIAN OCEAN: A STEP TOWARD LONG-TERM ENGAGEMENT



by Michael Purzycki

When American policymakers think of the Indo-Pacific region and the challenges it poses for U.S. security interests, it is understandable that the Pacific part comes to mind first. From the constant possibility of a Chinese invasion of Taiwan to North Korea's menacing nuclear arsenal, threats to stability in the Western Pacific have enormous implications for the United States. It would be a mistake, however, to ignore or downplay the Indo part.

The U.S. has a major stake in events in the Indian Ocean and the surrounding countries. While many events in and around that ocean may not require a U.S. military response, a constant U.S. military presence in key locations can ensure America maintains regular dialogues with countries that can help maintain stability in that part of the world. This includes helping America balance against China, a task it needs willing allies and partners to accomplish.

While the sinking of the Iranian frigate IRIS Dena by the American submarine USS *Charlotte* off the coast of Sri Lanka is an impressive feat of U.S. military prowess, it also has the potential to

be disruptive in the long term. The location of *Dena's* sinking was far closer to India's coastline than it was to Iran's, and Prime Minister Narendra Modi's reluctance to criticize the U.S. is seen by many Indians as a sign of weakness. Even when an American military action serves a clear American interest, if it ruffles feathers in many nearby countries, it behooves the U.S. to smooth them.

Homeporting naval vessels in several Indian Ocean countries can indicate decisively that America is paying close attention to developments in the region, and that Washington is not only interested during especially tense times like the conflict with Iran. American sailors interacting regularly with the military and civilian populations of key partner countries, and naval officers interacting regularly with the countries' political leadership, would establish a high level of trust in a U.S. policy of uninterrupted engagement. It would also allow for quick reactions to sudden events.

CURRENT CHALLENGES

When the U.S. deploys vessels to the Persian Gulf or other outlets of the Indian Ocean, they must generally come from the continental United States, a time-consuming process. It can take three weeks for a carrier strike group

(CSG) to reach the Middle East from the U.S. Navy's base in San Diego, for example. This puts significant strain on ships that must cross two oceans to reach their destination. Backlogs in ship repair and maintenance add to that strain.

Vessels can reach the Indian Ocean from the U.S. East Coast via the Suez Canal, but this presents issues, too. In 2021, the container ship *Ever Given* ran aground in the canal, blocking traffic for six days. If a similar blockage were to occur during a crisis to which Washington was responding with a naval deployment, American ships may not be able to reach their destination quickly enough.

Furthermore, while Egypt is a longtime ally of the United States that allows the U.S. Navy to use the Suez Canal, it is not guaranteed to continue playing that role forever. Russia's invasion of Ukraine disrupted the vital supply of wheat to Egypt (a source of leverage for Moscow), while Chinese investment has made Egypt a significant part of Beijing's Belt and Road Initiative. America's rivals may one day use their economic muscle to force Cairo to deny the U.S. access to the canal.

Even if Iran is forever deprived of the ability to make nuclear weapons, there may be situations that call for a U.S. military presence in the waters around the Arabian Peninsula. Terrorists, pirates, and other violent groups can wreak havoc on international trade – as the Houthis have done since 2023 – and failed states and civil wars can allow new malevolent actors to arise. These threats may be less significant to American interests than Chinese aggression in East Asia or Russian aggression in Europe, but they are still relevant.

Furthermore, China has increased its military presence in the Indian Ocean in recent years. In 2017, Beijing established its first overseas military base in Djibouti. The People's Liberation Army Navy has stepped up its training activities in the region: in 2023, for example, it conducted exercises in the Indian Ocean with Iran, Kuwait, Oman, Pakistan, Russia, Thailand, and the United Arab Emirates.

While some of these nations seek to maintain good relations with the U.S. at the same time, the more friends Beijing wins over across the Indian Ocean, the more headaches it can create for the U.S. in the event of a major conflict.

It would be difficult for the U.S. to counter China's growing naval presence with one of its own by relying on temporary or rotational deployments. Because America can never know when exactly its Navy will be called upon in great numbers to defend European or Pacific allies, positioning a small portion of its naval strength in the Indian Ocean allows the U.S. to hedge against uncertainty far from its homeland. Three locations in particular suggest themselves.

KENYA

At the western end of the Indian Ocean, Kenya would be an excellent location for American warships. Kenya has proven itself a valuable partner in protecting U.S. security interests in East Africa and beyond. In 2024, it became the first sub-Saharan African country to receive Major Non-NATO Ally (MNNA) status from Washington. Shortly before Russia invaded Ukraine, Kenya's ambassador to the United Nations gave an eloquent condemnation of Russian aggression, drawing a parallel between Ukraine's resistance to Vladimir Putin's tyranny and African peoples' struggles against European rule. Recent analysis by the American Enterprise Institute shows Kenya to be largely aligned with Israel and the United Arab Emirates in proxy struggles in East Africa.

Basing *Arleigh Burke* class guided missile destroyers in Kenya would give the U.S. Navy convenient access to the waters around the Arabian Peninsula without the stress of a long journey from the U.S. mainland. These workhorses of the Navy have been instrumental in shooting down Iranian and Houthi drones and missiles. In January, U.S. Deputy Secretary of State Christopher Landau attended a groundbreaking ceremony for a runway expansion at Kenya Navy Base Manda Bay, a sign of how

highly the U.S. values Kenya's friendship. Washington can build on this good rapport to ask Nairobi if it is willing to host American vessels in its bases.

AUSTRALIA

At the opposite edge of the Indian Ocean, Australia's western coast provides another good site.

Near the city of Perth sits HMAS Stirling, one of the largest facilities of the Royal Australian Navy, which is rising in prominence as a location for American vessel maintenance. Through such institutions as AUKUS and the Quadrilateral Security Dialogue (Quad), Australia and the U.S. are already working closely together to balance China's rise in the Indo-Pacific.

Much as the CSG based at Yokosuka, Japan, gives the U.S. a naval force with which to quickly react to any Chinese aggression toward Taiwan, placing a CSG at HMAS Stirling would give it a way to quickly react to any provocative Chinese presence in the Indian Ocean. Alternatively, should the carrier, its aircraft, and its escort ships be needed in or near the Persian Gulf, they would have a quicker route than what faces a CSG heading there from the American homeland. Australia's west coast provides an excellent pivot point for these purposes.

MAURITIUS

Diego Garcia, one of the Chagos Islands, is an intriguing possibility for basing ships. While the United Kingdom is in the contentious process of turning over the Chago Islands to Mauritius, the British military will retain access to its facility on Diego Garcia, which it shares with the U.S. There are currently U.S. Navy maritime prepositioning ships based there.

If the U.S. were to expand its naval presence in Diego Garcia to include combat vessels, that would give it another convenient location from which to deploy into the Indian Ocean, or else toward the Arabian Peninsula and the Horn of

Africa. It would be vital for the U.S. to maintain good relations with Mauritius, giving American diplomats a strong incentive to keep the island country from falling into China's orbit. Basing combat vessels here, while unorthodox, is worth Washington's consideration.

CONCLUSION

After the current fighting in Iran has ceased, the United States will still have reasons to keep a close eye not only on the Persian Gulf, but on the Indian Ocean. Basing vessels at key locations can help American policymakers quickly respond to both emergencies in the Middle East and China's growing presence in the Indo part of the Indo-Pacific. In an era when security challenges are constantly evolving, speed and flexibility are key for the leading nation of the free world. *

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INDIA-ISRAEL: A STRATEGIC CONVERGENCE IN A CHANGING WORLD



by Haim Azure

Prime Minister Narendra Modi's address to the Knesset represents a strategic inflection point in the evolution of India-Israel relations. Beyond symbolism, the visit signals the maturation of a partnership that increasingly bridges the Indo-Pacific and the Middle East — anchoring cooperation in defense, innovation, and shared democratic resilience at a moment when regional balances are shifting and global alignments are under stress.

Nearly a decade after his groundbreaking 2017 visit, Modi returned to Jerusalem not merely as a bilateral partner, but as the leader of the world's largest democracy. The historic nature of the address — the first ever by an Indian prime minister before Israel's parliament — underscores how far the relationship has evolved from cautious engagement to structured strategic convergence.

INSTITUTIONAL LEADERSHIP AND STRATEGIC RECOGNITION

The session opened under the stewardship of Knesset Speaker Amir Ohana, whose leadership framed the occasion with institutional dignity and geopolitical clarity. In welcoming Modi, Ohana emphasized the significance of hosting the

leader of a rising global power and underscored the depth of India's friendship toward Israel — particularly in moments of crisis.

By presiding over the ceremony with composure and strategic awareness, Ohana elevated the event beyond protocol. The conferment of the Knesset's newly established parliamentary medal upon Modi symbolized Israel's recognition of India not only as a partner, but as a country of growing weight in shaping the international order. At a time when Israel faces diplomatic pressures and regional uncertainty, honoring India in such a manner conveyed confidence rather than isolation.

NETANYAHU'S STRATEGIC FRAMING: MULTIPLYING STRENGTH

Prime Minister Benjamin Netanyahu reinforced this message by framing India as a "gigantic power" whose partnership with Israel acts as a multiplier of capabilities. His remarks moved beyond personal warmth — though the personal bond between the two leaders remains a visible feature of the relationship — to articulate a broader strategic logic.

Netanyahu emphasized that cooperation between Jerusalem and New Delhi amplifies innovation, defense readiness, and geopolitical reach. He publicly thanked Modi for standing firmly with Israel in the aftermath of the October 7 attacks, noting that solidarity in moments of crisis defines the authenticity of partnerships. In doing so, Netanyahu positioned

India not as a distant observer of Middle Eastern affairs, but as a democratic actor willing to engage meaningfully with regional realities.

MODI'S MESSAGE: ZERO TOLERANCE FOR TERRORISM, COMMITMENT TO STABILITY

In his address, Prime Minister Modi delivered a speech that balanced unequivocal solidarity with strategic nuance. He condemned terrorism in the strongest terms, reaffirming that India stands firmly with Israel and rejects double standards in confronting extremist violence. Drawing parallels with India's own experience of terror — including the 26/11 Mumbai attacks — Modi framed the fight against terrorism as a shared civilizational imperative.

At the same time, he reiterated India's support for dialogue, stability, and long-term peace in the Middle East. This calibrated posture reflects India's broader foreign policy tradition: principled opposition to terrorism combined with strategic autonomy. Modi's reference to the Abraham Accords signaled recognition of diplomatic breakthroughs in the region while acknowledging the complexities that persist.

The message was clear: solidarity does not preclude diplomacy, and strategic clarity does not exclude the pursuit of stability.

SECURITY, TECHNOLOGY, AND THE ARCHITECTURE OF PARTNERSHIP

The substance of the visit extends well beyond rhetoric. India and Israel have steadily deepened cooperation in defense technology, intelligence sharing, cybersecurity, and advanced innovation.

Today, that partnership spans missile defense systems, unmanned platforms, artificial intelligence applications, agricultural technology, and water management solutions. India's expanding industrial base and "Make in India" initiative align naturally with Israel's innovation ecosystem. The strategic logic is

mutually reinforcing: scale meets specialization; demographic weight meets technological agility.

Negotiations on expanded trade frameworks and infrastructure connectivity initiatives further indicate that the relationship is broadening from security-driven cooperation to comprehensive economic integration.

THE INDO-PACIFIC-MEDITERRANEAN ARC

Modi's visit must also be understood within a wider geostrategic context. India increasingly views the Middle East as an extension of its Indo-Pacific strategy, linking maritime security, supply chains, and infrastructure corridors across regions. Initiatives such as the India-Middle East-Europe Corridor (IMEC) and cooperative platforms like I2U2 reflect an emerging architecture connecting South Asia, the Gulf, Israel, and Western markets.

In this framework, Israel represents more than a bilateral partner; it is a technological node and strategic gateway to the Mediterranean. Conversely, India offers Israel demographic scale, market access, and global diplomatic reach.

As geopolitical competition intensifies — from revisionist powers in Eurasia to regional ambitions in the Middle East — the India-Israel partnership embodies a model of democratic coordination without formal alliance structures. It is pragmatic, interest-based, and resilient.

The timing of the visit is significant. The Middle East remains volatile, with shifting balances involving Iran, Turkey's regional posture, and persistent non-state militant threats. India maintains a calibrated approach to these dynamics, balancing relationships across the region. Yet its visible solidarity with Israel during crisis periods reflects a maturing assessment of shared threats.

Despite occasional trade tensions between New Delhi and Washington, India remains anchored in a broader democratic ecosystem. Israel, closely aligned with the United States, occupies a complementary position. The

convergence among these actors suggests the gradual consolidation of a flexible democratic network spanning the Indo-Pacific and the Mediterranean.

Modi also invoked the historical bonds between the Indian and Jewish peoples — centuries of coexistence and protection afforded to Jewish communities in India. These references were not merely ceremonial. They reinforced a narrative of civilizational respect that underpins modern statecraft.

People-to-people exchanges, tourism, academic collaboration, and entrepreneurial partnerships further solidify this foundation. Strategic partnerships endure when societal familiarity accompanies political alignment.

Prime Minister Narendra Modi's 2026 visit to Israel marks the consolidation of a relationship that has moved decisively beyond cautious diplomacy. From Speaker Amir Ohana's institutional leadership to Netanyahu's framing of strategic multiplication, and Modi's articulation of zero tolerance for terrorism alongside support for stability, the visit reflects a partnership grounded in shared interests and democratic confidence.

What was once an unlikely relationship has become a strategic bridge linking two dynamic regions. Its long-term trajectory will matter not only for Jerusalem and New Delhi, but for the broader geopolitical landscape connecting the Indo-Pacific to the Mediterranean. *

HAIM AZURE

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Credit: Reuters

ISRAEL'S INDIA OPPORTUNITY



by Eran Ortal, Lauren Dagan Amoss

With all eyes now on the unfolding conflict with Iran, it would be easy to ignore a very different regional development of recent weeks. That, however, would be a mistake. Although it has since been overshadowed by the new Gulf war, Indian Prime Minister Narendra Modi's recent state visit to Israel – complete with a historic address to the Knesset – speaks volumes about how New Delhi sees the Jewish state, and how one of Israel's most promising bilateral partnerships might progress.

For starters, it must be noted that India's ties to Israel run deep. Prime Minister Modi made his first visit to Israel nearly a decade ago, back in 2017. It marked the first such state visit by an Indian Premier, and it was far more than merely a ceremonial milestone. Rather, it signaled the start of a sophisticated geo-economic gambit – one that is now coming more clearly into view.

That much was evident during Modi's visit last month. In his Knesset address, India's leader outlined both his government's broader strategic outlook and Israel's place within it. In his remarks, Modi signaled a commitment to building a regional architecture designed to embed India more deeply into trade and connectivity to its west.

That effort is driven in large part by New Delhi's search for strategic autonomy as it seeks to escape China's growing shadow in the Indo-Pacific. No longer defined by its Cold War-era doctrine of non-alignment, India is now prioritizing issue-based coalitions and partnerships with countries whose strategic trajectory is durable and predictable. This logic, in turn, favors states whose survival and prosperity are tied to the stability of the rules-based international order.

At its heart of India's vision for the Eastern Mediterranean is the India-Middle East-Europe Economic Corridor (IMEC). IMEC is much more than simply a commercial route. It is designed to offer India's international partners a "values-based" alternative to China's Belt and Road Initiative (BRI), thereby reducing Beijing's leverage over Eurasian trade and energy flows.

The problem IMEC seeks to address is a significant one. Over the past decade, Beijing has leveraged large-scale investments in transportation, energy, and telecommunications to establish a profound presence across the Middle East, South Asia, and Europe. This has created a structural interdependence in which economic relationships are inextricably linked to Chinese strategic interests.

From a strategic perspective, IMEC represents an effort to break up this monopoly. It serves as a normative counterweight to China's model of state-centric control and

top-down financing. Instead, it envisions a smaller and more flexible framework in which the economic and political interests of partners, while not identical, overlap in their desire to mitigate Chinese unilateralism.

This is where Israel comes in. For India, a reliable corridor requires anchor states that offer institutional stability and technological maturity. This explains why Indian planners have increasingly looked toward Israel and Greece as key destinations. While other prospective routes may offer more convenient geography, they lack the normative reliability and security predictability that India requires for long-term strategic investment.

Nevertheless, China's structural advantage remains formidable. The BRI rests on a foundation of already-commissioned projects and established logistical networks, such as the China-Pakistan Economic Corridor (CPEC) and the strategic Port of Gwadar. Furthermore, China's influence is further reinforced by its deep diplomatic engagement with Iran and the Gulf states, as well as its control over critical infrastructure components such as subsea communication cables.

For this reason, the challenge for IMEC is not simply to propose a technical alternative, but to establish institutional credibility and long-term resilience. For New Delhi and its partners, the corridor's viability depends on its ability to create a de-risked ecosystem that prioritizes transparency and distributed governance over dependency and top-down control.

For both New Delhi and Jerusalem, the IMEC moment is about distinguishing between diplomatic weather and geopolitical climate. Middle Eastern regimes often pursue tactical rapprochements in order to manage domestic pressures or regional developments, but such moves rarely alter underlying threat perceptions or ideological fault lines. By contrast Indian statecraft, rooted in a tradition of cautious realism, tends to prioritize structural alignment over tactical flexibility. Strategic infrastructure – from fiber-optic cable to energy pipelines to

port facilities – requires a durable foundation that only stable, technologically advanced and strategically committed partners such as Israel can provide.

Still, much work remains to be done. If IMEC is to progress beyond the conceptual stage, it must be institutionalized across three domains: security, standards, and government commitment. Israel can contribute on all three fronts, from sharing expertise on cyber-resilience to establishing permanent working groups and financing frameworks that can survive turbulent political cycles. Encouragingly, Jerusalem is showing signs that it is increasingly prepared to do so.

The significance of the current Indo-Israeli momentum lies in its shift from symbolism to operational synergy. India's westward connectivity strategy views Israel not merely as a market, but as a security provider for the corridor itself. Ultimately, the success of this vision will be measured by the number of tangible projects that it yields that embed Israel more deeply into the Indo-Pacific and make it a meaningful player there. *

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HOW TO AVOID AN ACCIDENTAL NUCLEAR WAR WITH NORTH KOREA



Credit: Reuters



by John V. Parachini

What Kim Jong Un says at the current Ninth Party Congress meeting will reveal whether there is an opening for nuclear negotiations with the Trump administration. Despite President Trump's repeated offers to meet with North Korea's leader Chairman Kim Jong Un during his recent trip to Asia, there was no response. Kim's appearance with Xi Jinping and Vladimir Putin at China's recent military parade commemorating the end of World War II shows he is firmly aligned with two other great powers and may not feel the need to meet with the United States president. Kim is in a much stronger political position now than he was during President Trump's first term. To re-start talks between the United States and North Korea, new approaches are needed.

Kim declared that North Korea "will never give up nuclear [weapons]," which he described as being "tantamount to demanding we surrender our sovereignty." For Kim, possession of nuclear weapons is "irreversible." Given that North Korea has conducted six nuclear weapons tests since 2006 and may have a nuclear arsenal equal to France and Britain, his claim to be a nuclear state is, regrettably, credible. Four

American presidents have failed to curb North Korea's drive to obtain a nuclear weapons capability. It is time to consider something other than just demanding he give up a nuclear arsenal he believes is essential to his survival.

During his confirmation hearings, Secretary of State Marco Rubio suggested that the United States needs to consider a new approach to reducing the risk of inadvertent nuclear war as path to the ultimate goal of denuclearization of the Korean Peninsula. Exploring measures to reduce inadvertent war may help to change security and political facts on the ground.

South Korean President Lee Jae Myung announced a new policy to further relations between the two Korean states during his speech at the annual UN General Assembly meeting last year. The policy has a catchy anachronism END, which stands for Exchange, Normalization, and Denuclearization. President Lee stressed "we must end the era of hostility and confrontation on the Korean Peninsula and usher in a new era of peaceful coexistence and shared growth." While President Lee's new initiative may advance Secretary Rubio's call to reducing the risk of nuclear war, Chairman Kim rejected it in part because of its call for denuclearization.

Former U.S. Director of National Intelligence in his memoir "Facts and Fears" suggested several political measures might change the political dynamics in constructive ways. He

argued that a "reasonable first step might be to meet [North Korea's] for a peace treaty," since "all we have now is a ceasefire." Clapper argued that "Only the bigger partner can change the narrative."

In Joel Wit's recently released and exhaustively researched account of U.S.-North Korean nuclear negotiations over the course of the last 30 years, he makes similar suggestions and also offers some creative economic options that might further President Lee's call for exchange, and normalization in the short-run and leave open the possibility of denuclearization in the long-run. Wit notes that Australian mining companies believe North Korea has considerable deposits of rare earth minerals that are critical to the digital economy. Following the model of the U.S.-Ukraine agreement on a reconstruction investment fund to facilitate mining rare earth minerals, the U.S. and North Korea could fashion a similar agreement that spurs rare earth mineral mining. To advance this initiative some sanctions would need to be repealed, which is something Chairman Kim has long sought.

Another policy course change Wit suggests is to call for a freeze on further North Korean nuclear tests and a halt of missiles tests by both Koreas could start the process. Since North Korea has a nuclear capability, shifting discussions to measures that reduce inadvertent nuclear is a pragmatic approach. These limited but highly visible security steps could complement more dramatic political and economic measures.

Given Kim's stated position that North Korea is a nuclear weapons state, he will not readily engage in discussions designed to take away nuclear capabilities that he believes ensure his country's survival. Shifting the focus of nuclear diplomacy to political and economic measures as well as steps to reduce the risk of inadvertent nuclear war is valuable in itself and might bring Kim back to the negotiating table. Measures reducing the risk of nuclear conflict can serve as pathway to denuclearization rather than

insisting North Korea give up its nuclear arsenal right now and have a better chance of restarting suspended negotiations. *

— JOHN V. PARACHINI

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Credit: Reuters



by *Elena Davlikanova, Oleh Dunda*

President Donald Trump returned to the White House promising to end the war almost instantaneously. That has proven far harder than the slogan suggested. Still, the President did manage to end or de-escalate several other conflicts in a relatively short period of his second term, and he can still add one more success to that record. But only if the White House shifts from trying to “befriend” Russia into a deal, and instead continues imposing costs that make games unaffordable.

Recent diplomacy shows what is possible when pressure and engagement move in tandem. In January and February 2026, the United States helped broker trilateral talks between Ukraine and Russia in Abu Dhabi, hosted by the UAE. Those talks, while far from a final settlement, produced substantial prisoner exchanges and a framework for further negotiations, with Washington proposing to host the next round, likely in Miami.

The informally set deadline of June 2026 as a target to reach a peace agreement is reachable, if one wild card is played now. Thus, President Trump can save many more lives.

It is the bipartisan Sanctioning Russia Act, co-sponsored by Senators Lindsey Graham and Richard Blumenthal. The bill would impose

sweeping secondary tariffs and sanctions on countries and firms that continue to buy Russian oil and gas, effectively weaponising access to the U.S. market against Russia’s remaining energy customers.

Graham has stated that President Trump has “greenlit” the legislation and that it would give the White House “the most powerful economic weapon yet to end this war.” If Congress were to pass this bill around 22 February, it would send an unmistakable signal and materially accelerate the re-routing of global energy flows away from Moscow.

Treasury Secretary Scott Bessent has recently suggested that the pace and depth of additional U.S. sanctions will depend on the trajectory of the talks. Russia appears to be exploiting this approach, dragging out negotiations while seeking to seize Donbas before next winter. By that time, the United States will have entered the midterm election cycle. A real peace in Ukraine—if achieved earlier—would constitute a major political victory for U.S. political elites, rather than a problem deferred into the election year.

Here is where President Trump has already shown the right instinct. The Treasury recently announced sanctions targeting major Russian oil entities and a sweeping set of vessels and facilitators tied to oil exports—explicitly aimed at Russia’s primary revenue stream. This is the correct center of gravity.

Europe is moving in the same direction. The European Commission has adopted a new sanctions package focused on Russian seaborne crude exports and the services that enable them—insurance, shipping management, and port-adjacent support—while also targeting additional shadow fleet vessels. The package adds 43 more ships, bringing the listed total to around 640. That is exactly the type of scalable pressure that directs diplomatic energy the right way.

The new package of restrictions from the EU involves the introduction of sanctions against third-country ports that provide services to tankers involved in shadow trading. This is a very powerful signal and blow. So far, the list includes ports in Georgia and Indonesia. But if other countries violating the sanctions end up on it, then there would be no need to wait for Senators Graham and Blumenthal’s bill to be passed. The restrictions would be felt immediately by the violators.

Since February 2022, Russia has earned roughly \$450 billion from global fossil-fuel exports. About \$190 billion of that has been tied to EU purchases. This means Washington still has leverage not only over Moscow, but its partners across the Atlantic.

The move with India was another brilliant example of the White House. Faced with U.S. pressure over its swelling purchases of discounted Russian crude, New Delhi has agreed to diversify suppliers, increased imports of U.S. and Gulf oil and LNG, and shown more willingness to discuss price caps and transparency on re-exports.

The possibility of imposing additional duties and tariffs on countries that facilitate the gray import of dual-use goods, industrial machinery, polymers, and chips into Russia remains unused. The Kazakh authorities have so far been unable to explain the reasons for the sharp increase in imports of technological equipment into the country and the large turnover of funds in the IT sector since the start of the war in Ukraine. Imports to Georgia,

Armenia, and Azerbaijan, which share a border with Russia, have risen sharply. Intermediaries in Turkey and the UAE are actively involved in the supply chains for technologies and components for the production of missiles and communication equipment. Russia continues to purchase and import all of this in huge quantities, using the territories of other countries as transport and logistics hubs and banking systems to make payments. Closing ports and gray imports would put enormous pressure on Putin. And on China, without direct confrontation. Beijing, which is Moscow’s rear base for supplying resources, technologies, and equipment that are critical to the war, would be physically unable to handle all the logistics of direct deliveries. And it would have to drop the mask of ignorance and ostensible neutrality.

This approach is much more promising than just another round of attempts to befriend Russia, which always end with the same result. Hence, the reverse-Kissinger strategy is a delusional idea. The original U.S. opening to China worked because the Sino-Soviet split was already deep and structurally rooted; Washington exploited an existing rift, it did not create one.

Today, Russia’s dependence on China is a regime-survival choice. Trying to woo Moscow with concessions risks a double loss: the United States would not pull Russia out of China’s orbit, and it would push key allies in Europe and Asia to hedge more aggressively toward Beijing.

Meanwhile, the human cost of “talks without leverage” is mounting. The U.N. Human Rights Monitoring Mission in Ukraine reported that 2025 was the deadliest year for Ukrainian civilians since the full-scale invasion, with 2,514 killed and 12,142 injured—a 31% increase in civilian casualties compared to 2024.

The trend continued into early 2026: in January alone, Russia launched one of the largest combined strike waves of the war, using roughly 70 missiles and more than 400 drones in a series of attacks aimed at Ukraine’s energy grid and heating infrastructure.

Ukrainian officials estimate that since October 2025 Russia has disabled or destroyed about 8.5 gigawatts of generation capacity—nearly half of typical national power demand. Ukrainians increasingly refer to this strategy as “coldocide” (genocide by cold): the deliberate use of winter, energy deprivation, and blackouts as tools of civilian coercion.

More pressure from Washington will create the right frame given the situation on the battlefield. Data compiled by independent analysts show that in 2025 Russia gained only about 0.77% of Ukrainian territory—measurable on a map at an enormous human and economic cost. Still, it is far short of any decisive breakthrough.

Ukrainian and Western intelligence estimate that Russian monthly casualties routinely exceed 40,000–50,000 killed and wounded. January 2026 marked the first month in which Russia mobilised fewer soldiers than it lost at the front. Kyiv, for its part, openly states that its objective is to surpass 50,000 Russian combat losses per month to push Moscow toward meaningful negotiations.

Thus, the key to the “quick peace” that President Trump spoke of lies not in the Kremlin’s words and assurances, but in its accounting. If Washington and Brussels manage to permanently cut off Moscow’s financial arteries by the summer of 2026, the US president will get his main geopolitical trophy and trump card in the elections. And Europe and Ukraine will gain peace. In such a scenario, it will not be the result of concessions to the aggressor, but a consequence of the mathematical impossibility of continuing the war. The time for persuasion is over; it is time for an economic sentence that can save thousands upon thousands of lives. *

— ELENA DAVLIKANOVA

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— OLEH DUNDA

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Credit: Sipa USA via Reuters Connect

WHY ITALY IS THE STRATEGIC ANCHOR OF US POLICY IN THE MEDITERRANEAN



by Niccolò Comini

As the United States reassesses its military posture in Europe and shifts strategic bandwidth toward the Indo-Pacific, it must also reassess the architecture of its Mediterranean partnerships. The Mediterranean remains a theater Washington cannot afford to neglect. Between Russian revanchism, Chinese technological penetration, North African instability, energy corridors, and the security of the Red Sea, the region continues to hold structural importance for American power projection.

If American commitments in Europe become more selective, the question is no longer whether the United States will retain influence in the Mediterranean — but through which partners it will do so.

In this recalibration, Italy increasingly stands out as Washington's most reliable strategic anchor.

THE TURKISH DILEMMA

Turkey remains geostrategically indispensable. Control of the Bosphorus and Dardanelles under the Montreux Convention gives Ankara leverage over Black Sea access. Its NATO membership provides critical infrastructure and southern flank positioning. Moreover, Turkey has at times played constructive roles, including facilitating aspects of the Ukraine grain corridor diplomacy.

Yet, strategic alignment and geostrategic necessity are not synonymous.

Over the past decade, Ankara has pursued a doctrine of strategic autonomy that increasingly diverges from Western consensus. Turkey became a significant hub for refining Russian

crude oil following sanctions on Moscow, complicating Western efforts to constrain Kremlin revenues. In 2024, it was among the largest importers of Russian crude, and Turkish exports of refined products to G7+ countries indirectly generated substantial revenue streams benefiting Moscow.

Although new sanctions in 2025 reduced these flows, the pattern revealed a broader willingness to operate within gray zones of compliance.

Turkey's economic interface with Iran has also raised concerns in Washington, particularly as sanctioned Iranian oil finds pathways through regional commercial networks. In October 2025, the US Department of Commerce sanctioned several Turkish entities for export-control violations, underscoring persistent misalignment.

Equally consequential is Ankara's embrace of Huawei for 5G infrastructure development. For NATO, this introduces potential vulnerabilities in intelligence interoperability and raises questions about long-term technological alignment.

None of this renders Turkey irrelevant. But it does complicate its role as a dependable pillar of US Mediterranean strategy.

WHY ITALY'S ROLE IS STRUCTURALLY DIFFERENT

Unlike Turkey, Italy's alignment with the United States is not episodic — it is structural.

Geographically, Italy sits at the center of the Mediterranean basin, linking the Western Mediterranean to the Eastern Mediterranean, North Africa, and the Adriatic corridor. American basing infrastructure in Italy — including key air and naval facilities — provides Washington with operational depth across Europe, the Levant, and Africa.

Rome's 2022 defense doctrine formally embraced the concept of the "Mediterraneo allargato" (wider Mediterranean), recognizing that instability in the Sahel, North Africa, and the Red Sea directly impacts European security. Italy has increasingly invested in maritime security, undersea infrastructure protection, and hybrid warfare resilience — including proposals for expanded civil-military capabilities to counter gray-zone threats such as undersea cable sabotage.

Politically, Prime Minister Giorgia Meloni's government has aligned firmly with transatlantic priorities. Italy has delivered 12 aid packages to Ukraine worth over €3 billion, supported NATO deterrence efforts, and backed sanctions regimes against Moscow.

MEDITERRANEAN SECURITY AND THE MIDDLE EASTERN LINK

Italy's strategic posture also intersects directly with Middle Eastern stability.

Rome participates in Operation Aspidi to secure commercial routes in the Red Sea against Iranian-backed Houthi attacks — a mission that safeguards global energy flows and maritime trade. Italy has maintained a firm stance against Iran's nuclear ambitions and has supported diplomatic efforts aimed at preventing escalation.

In the Eastern Mediterranean, energy cooperation between European and regional actors further reinforces Italy's relevance. As energy diversification away from Russia accelerates, Mediterranean gas corridors linking North Africa and the Levant to Europe increase Italy's role as both transit hub and political mediator.

This is not merely European security — it is the southern flank of the transatlantic system.

ITALY BEYOND THE MEDITERRANEAN

Italy's strategic repositioning extends beyond its immediate geography.

Rome withdrew from China's Belt and Road Initiative in 2023, signaling a decisive pivot away from strategic ambiguity. It has deepened defense cooperation with Japan and the United

Kingdom through the Global Combat Air Programme (GCAP) to develop sixth-generation fighter aircraft. Italian delegations have engaged Taiwan on semiconductor cooperation, and Rome has strengthened rare earth and technology partnerships with Indo-Pacific democracies.

Simultaneously, Italy's Mattei Plan seeks to recalibrate European engagement in Africa in ways that reduce dependency on Chinese state-driven investment models.

These actions suggest not only alignment with US interests, but convergence in worldview.

STRATEGIC SELECTIVITY IN AN ERA OF CONSTRAINTS

Even if Washington reduces its military footprint in Europe, it cannot disengage from the Mediterranean. Energy security, Russian naval access, North African migration flows, undersea infrastructure, and the Red Sea corridor all converge in this basin.

In such a scenario, the United States will depend increasingly on bilateral anchors capable of sustaining strategic continuity.

Turkey will remain important — but unpredictable.

France is powerful — but often strategically autonomous.

Greece is reliable — but geographically narrower in reach.

Italy combines geography, alignment, operational infrastructure, and political will.

In an era defined by resource constraints and alliance recalibration, Rome is not simply another Mediterranean partner. It is the most structurally aligned strategic anchor available to Washington. *

— NICCOLÒ COMINI

Niccolò Comini is an independent researcher specializing in Italian politics and foreign policy. His work focuses on Italy's domestic political dynamics, its role within the European Union, and its strategic positioning in the broader international arena.



ESTONIA HAS THE CARDS: TINY TECH NATION CAN DOWN IRANIAN DRONES



by Melinda Haring

Estonian Defense Minister Hanno Pevkur spoke with the Jerusalem Strategic Tribune's Melinda Haring on March 19, 2026 from Miami, Florida, where he was attending the Miami Security Forum. Pevkur assumed his position in July 2022. From 2022 to 2025, Estonia's defense sector has grown seven-fold, and Pevkur expects more growth. Estonia has focused on automatization, robotics, AI, drones, and unmanned systems. The interview has been edited for clarity and length.

HARING: Let's talk about Iran and the Strait of Hormuz. You called for unity between the US and Europe and expressed willingness to talk. What might Estonia be able to offer?

PEVKUR: The situation in Iran and the blockage of the Strait of Hormuz affects all of us globally. The price of oil, gas and fertilizer has an impact on farmers, so it is clear that we need to find solutions. For me, it is more a question of free trade and freedom of navigation than a military question.

From a military point of view, Estonia has been a long and strong military partner in NATO's mine hunting group, so everything regarding mine hunting, there we have good strengths.

In Washington I met with Deputy National Security Advisor Andy Baker and Army Secretary Dan Driscoll. I didn't hear any specific requests so far, but I told them that we are ready to discuss.

HARING: Do you have something similar to what the Ukrainians are using to take down Iranian Shaheed drones?

PEVKUR: The Ukrainians are using a lot of Estonian equipment. For drone detection, one Estonian-Ukrainian company is producing acoustic sensors which are important to detect drones early. Many Estonian companies are producing interceptor drones, which are needed to take down Shaheed drones and have been quite effective in Ukraine. So yes, Estonia has specific capabilities which might be helpful in the Iran conflict.

HARING: You said that Estonia doesn't have the capacity to make fighter jets and tanks but it does have the capacity to build small and smart systems. Please give me some examples.

PEVKUR: Absolutely. We are focusing on disruptive technologies in Estonia, mostly on how to make older legacy systems smarter. We have one company producing a high-end camera system without any lag. The camera is mounted on a tank or infantry fighting vehicle. This means that the commander of a tank, for example, has a 360-degree view outside of the tank plus a view from drones and other sources of information. It has been tested in Ukraine.

There is a joint Estonian-Ukrainian company called telearmy which is producing self-driving vehicles that can evacuate wounded soldiers. The driver is sitting comfortably in a safe location.

HARING: Estonia has two companies building cruise missiles. What can you tell us?

PEVKUR: There are two companies that are

working on cruise missiles quite successfully. They are already in the testing phase. The aim is still to have very long-range cruise missiles.

HARING: Estonia has a long tradition of boat building and there was a deal between Estonia and Oman in the past. What can Estonia offer the Middle East?

PEVKUR: We've built 14 patrol vessels for the Omani government. And we have two or three companies that can produce everything from smaller boats to bigger ships. In Europe, they've built many vessels for Germany and Norway, and also for the Gulf.

HARING: Do you agree that the United States is behind on integrating drones into the armed forces? And if yes, what can we do about it?

PEVKUR: Drones are here to stay and we've seen how much they are changing the battlefield in Ukraine. For that reason, Estonia established the Force Transformation Command last October that is specifically focused on the drone industry and how to integrate drones into the Estonian Army and Air Force. We clearly see that starting from detection and interception, we need to develop our loitering drones and attack drones much more. But my understanding is clear that every army or every military around the world has to take drone development very seriously.

HARING: We are starting to see more cooperation between European and U.S. companies. For example, Rheinmetall and Lockheed are cooperating on building long-range ATACMS missiles. What kinds of partnerships are you seeing? What are they a result of?

PEVKUR: I can already confirm that Estonia has agreed that Lockheed will bring one of their units to Estonia and we're looking for even further cooperation. For instance, Anduril is looking for a greater European presence. From this industrial cooperation point of view, we

have different companies who are interested to come to Europe, who are interested to cooperate. It's not about competition between countries, but rather it's about the partnership and cooperation to prevent any kind of risks to Europe and NATO.

HARING: Is there anything else you'd like to add?

PEVKUR: Estonia is changing its laws to reduce bureaucracy. We have a state program to help foreign companies come to Estonia. For instance, we established the Defense Industry Park, where we can host companies to work with explosives. We established our own explosive factory, and we are looking for investors. It's a state-owned company, but we are starting the bidding process to give away 49% of the shares. And we have a special program for companies that reinvest their profits. Every reinvested dollar or every reinvested Euro is tax-free in Estonia. And now, in 2025, we also introduced a new investment support tool, which is that when you invest at least 100 million euro in an Estonian factory or Estonian production, you will get 20% of that amount back immediately, so 20 million euro back. *

MELINDA HARING

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General James L. Jones served as the 21st United States National Security Advisor (2009–2010). A four-star Marine Corps general, he was the 32nd Commandant of the Marine Corps.

LIBYA AND THE RETURN OF STRATEGIC LEADERSHIP IN THE MEDITERRANEAN



by General James L. Jones (Ret.), USMC

For more than a decade, Libya has stood as a symbol of unfinished intervention — a country liberated from dictatorship but never stabilized into durable statehood. The result has not merely been internal fragmentation. It has been the steady erosion of security across the central Mediterranean, the expansion of external influence, and the normalization of instability along NATO's southern flank.

Libya today is not simply a humanitarian concern or a diplomatic puzzle. It is a strategic test of whether the United States intends to remain a shaping power in the Mediterranean — or whether it will accept a future defined increasingly by others.

The United States cannot afford continued passivity.

The Mediterranean is not a peripheral theater. It connects Europe, North Africa, and the Middle East. It is a corridor for energy flows, migration routes, commercial traffic, and security partnerships. Instability in Libya reverberates directly into Southern Europe, testing alliance cohesion and creating pressure points that adversaries are quick to exploit.

Over the past decade, international diplomacy has centered largely on political roadmaps, ceasefire arrangements, and election timelines. These efforts have reflected good intentions. Yet they have repeatedly faltered for one fundamental reason: sustainable political processes cannot succeed in the absence of a unified and credible security architecture.

Statehood begins with security. Without territorial control, a coherent chain of command, and disciplined armed forces capable of enforcing national authority, elections become aspirational rather than transformative.

Libya's fragmentation has not persisted because of a lack of conferences or communiqués; it has persisted because the country remains divided between competing armed structures with no integrated national command.

This is where strategic realism must guide policy.

In eastern Libya, the Libyan National Army (LNA) has established a degree of territorial control and internal cohesion that contrasts sharply with the militia fragmentation seen elsewhere in the country. This reality does not require endorsement of every past action, nor does it imply disregard for the complex political and humanitarian dimensions of Libya's conflict. But effective strategy must begin with facts on the ground.

Engagement is not endorsement. It is influence.

If the United States chooses not to engage the actors who exercise meaningful control over territory and security structures, others will. Recent years have already demonstrated that external powers are prepared to expand their leverage in Libya, whether for military positioning, energy access, or geopolitical advantage. A vacuum in North Africa does not remain empty for long.

For Washington, the question is not whether Libya is complicated. It is whether the costs of disengagement exceed the risks of structured involvement.

There are four strategic interests at stake.

First, counterterrorism. Ungoverned or weakly governed spaces have historically provided fertile ground for extremist networks. While major terrorist organizations have been degraded in Libya, the absence of consolidated national security institutions leaves open the possibility of resurgence.

Second, alliance stability. European partners continue to bear the immediate pressures of irregular migration flows across

the Mediterranean. Persistent instability in Libya contributes directly to these flows and, by extension, to political volatility within allied democracies.

Third, energy security. Libya possesses significant hydrocarbon resources whose reliable production contributes to global market stability. Fragmentation and insecurity undermine consistent output and discourage long-term investment.

Fourth, geopolitical competition. Strategic competitors understand the importance of positioning along the Mediterranean littoral. Military access, port facilities, and political leverage in North Africa carry implications far beyond Libya's borders.

A more coherent U.S. approach to Libya would not require large-scale military intervention. It would require leadership.

Such leadership could include the appointment of a senior-level envoy empowered to coordinate interagency policy and align closely with European allies. It would involve shifting diplomatic emphasis toward security-sector integration as a prerequisite to national political reconciliation. It would require calibrated engagement with existing security structures in both eastern and western Libya, encouraging gradual unification under civilian authority rather than perpetuating parallel systems.

Importantly, engagement must be conditioned and purposeful. Support for security consolidation should be tied to measurable steps toward national integration, professionalization of forces, and respect for basic governance norms. The objective is not to empower a faction indefinitely, but to create the foundation upon which a unified Libyan state can emerge.

Critics may argue that Libya's divisions are too entrenched, its political class too fragmented, and its regional dynamics too complex to justify renewed American focus. Yet history suggests that prolonged strategic neglect often proves more costly than disciplined engagement. The longer fragmentation persists, the more entrenched external influence becomes and the harder eventual stabilization will be.

The United States retains significant diplomatic credibility and alliance networks in the Mediterranean. It has relationships with

European capitals, dialogue with regional actors, and experience in security-sector reform. What has been lacking is not capacity, but sustained prioritization.

Libya will not be stabilized by rhetoric alone. Nor will it be stabilized by attempting to bypass those who command forces and territory. Durable peace requires the integration of security structures into a national framework — one that reflects Libya's sovereignty and is supported, rather than shaped, by external partners.

The alternative is continued drift: periodic ceasefires, stalled elections, fragmented institutions, and opportunistic interference by outside powers. That path leads not to resolution, but to normalization of instability.

The Mediterranean has long been a central arena of strategic competition. It remains so today. The United States must decide whether it intends to help shape Libya's trajectory toward unified statehood, or whether it will remain a distant observer as others define the outcome.

Strategic leadership does not demand perfection. It demands engagement guided by realism, alliances, and long-term national interest.

Libya's future is ultimately for Libyans to determine. But whether that future unfolds within a stable sovereign framework — or within a fractured landscape vulnerable to external manipulation — will depend in no small part on whether the United States chooses to reassert steady, disciplined leadership in the Mediterranean. *

GENERAL JAMES L. JONES

General James L. Jones served as the 21st United States National Security Advisor (2009–2010). A four-star Marine Corps general, he was the 32nd Commandant of the Marine Corps and later Commander of U.S. European Command and Supreme Allied Commander Europe (SACEUR). He serves on the Board of Directors of World Herald Tribune Inc. and the *Jerusalem Strategic Tribune*.

THE IRAN WAR IS RECASTING THE RED SEA AND THE HORN OF AFRICA AS A STRATEGIC BATTLEGROUND

From IMEC to China's Belt and Road, global powers are converging on one of the world's oldest geopolitical crossroads





By Shiri Fein-Grossman

The war involving Iran is often described as a Middle Eastern crisis. In reality, its consequences extend far beyond the Gulf. As tensions disrupt shipping routes, energy markets and regional alliances, the ripple effects are reshaping one of the world's most important geopolitical arenas: the Red Sea and the Horn of Africa.

The same shipping lanes threatened by escalation around Iran pass through the Bab el-Mandeb Strait, the narrow gateway between the Red Sea and the Indian Ocean. That geography places Africa, particularly the Horn of Africa, directly along the fault line of a conflict that could reshape global trade routes and power balances.

From Gulf investment and Turkish security partnerships to China's infrastructure networks and emerging trade corridors such as the India-Middle East-Europe Economic Corridor (IMEC), global powers are increasingly converging on the same strategic geography. At the center of that competition sits Africa.

African leaders have responded to the escalation with a mix of concern and restraint. The African Union warned that further confrontation could destabilize global energy markets and deepen inflation and food insecurity across already fragile economies. Governments from Nigeria to Kenya, Ghana to Algeria have largely called for de-escalation and diplomacy.

Several African states also condemned missile attacks targeting Gulf countries,

emphasizing sovereignty and regional stability. This response reflects more than diplomatic principle. Over the past decade, Gulf states have become major investors across Africa.

Ports, logistics corridors, renewable energy projects and agricultural partnerships funded by Gulf capital are now embedded in development strategies across the continent. For many African economies, instability in the Gulf is therefore not distant geopolitics but an immediate economic concern.

Yet the deeper story unfolding beneath the surface is more significant. The Iran conflict is accelerating a structural shift already underway: Africa is becoming one of the central arenas of global strategic competition.

A CONTINENT AT THE CENTER OF GLOBAL RIVALRY

Africa occupies an increasingly pivotal position in the emerging global order.

The continent holds vast reserves of critical minerals essential for advanced manufacturing, defense technologies and the global energy transition. Cobalt from the Democratic Republic of Congo, platinum from South Africa and lithium from southern Africa are critical for batteries, semiconductors and clean energy technologies.

Africa also sits astride vital maritime corridors connecting the Atlantic, the Mediterranean and the Indian Ocean trade networks. With the world's fastest-growing population and expanding consumer markets, the continent is becoming an increasingly important arena for economic influence.

China has been the most visible external actor over the past two decades. Beijing is

Africa's largest trading partner, a dominant infrastructure financier and a major buyer of critical minerals. Chinese-backed projects now span railways, highways, ports and industrial zones across the continent.

The Iran war intersects with this relationship in important ways. China absorbs the overwhelming majority of Iran's oil exports, accounting for roughly 80 to 90 percent of Tehran's overseas oil sales. Disruptions to Iranian supply or instability along maritime routes quickly ripple through global energy markets, affecting African economies already vulnerable to fuel price volatility.

In this sense, the Iran conflict is not simply a regional confrontation. It is a stress test for a wider economic system linking the Gulf, Asia and Africa.

TURKEY'S EXPANDING PRESENCE

China is not the only external power expanding its footprint.

Over the past two decades, Turkey has significantly deepened its engagement across Africa under President Recep Tayyip Erdogan. What began as diplomatic outreach has evolved into a broader strategy combining trade, infrastructure investment and security cooperation. Turkey has expanded its diplomatic presence dramatically, growing from only a handful of embassies in the early 2000s to more than forty today. Turkish Airlines now connects dozens of African cities to Istanbul, turning Istanbul into a major aviation hub linking Africa with Europe and Asia.

Trade between Turkey and African countries has surged to roughly \$37–40 billion in recent years. Turkish companies have built airports, housing projects and transport infrastructure across the continent, while Ankara has become an increasingly visible security partner through drones, military training and defense cooperation agreements.

For African governments, Turkey represents another partner in an increasingly multipolar environment. For Ankara, Africa offers both economic opportunity and geopolitical influence.

GULF INVESTMENT RESHAPING AFRICA'S ECONOMIC LANDSCAPE

Alongside Turkey and China, the Gulf states have emerged as major economic actors shaping Africa's future.

The United Arab Emirates in particular has become one of the largest sources of foreign investment on the continent. Emirati companies have invested billions of dollars in African ports, logistics networks and infrastructure, linking maritime trade routes with inland supply chains and integrating African markets into broader Gulf logistics networks.

For Gulf countries, Africa serves several strategic purposes: diversifying economies beyond hydrocarbons, securing long-term food supplies and strengthening influence along maritime corridors connecting the Indian Ocean, the Red Sea and the Mediterranean.

THE HORN OF AFRICA: AN ENDURING STRATEGIC CROSSROADS

Few regions illustrate these overlapping dynamics more clearly than the Horn of Africa. For centuries, the area has served as a maritime crossroads connecting Africa, the Middle East and Asia. Today, its strategic relevance is once again intensifying.

The Horn sits along the Bab el-Mandeb Strait, one of the world's most important maritime chokepoints. A significant share of global trade and energy shipments passes through this corridor.

The region's importance has grown further with new connectivity initiatives such as the India-Middle East-Europe Economic Corridor (IMEC), announced at the 2023 G20 summit. The project aims to link India with Europe through maritime routes to the Gulf and rail networks crossing Saudi Arabia, Jordan and Israel before reaching the Mediterranean.

If fully realized, IMEC would create a major economic corridor connecting India, the Gulf and Europe. Saudi Arabia sits at the geographic center of the proposed land route, making Riyadh's participation a decisive factor in the project's long-term viability.

Yet regional dynamics suggest alternative configurations may also emerge. As Saudi Arabia increasingly coordinates regional diplomacy and security with partners such as Turkey and Egypt, Israel, the United Arab Emirates and India have explored complementary trade and logistics frameworks that do not rely exclusively on Saudi participation.

Recent diplomatic developments also reflect growing attention to the African side of the Red Sea system. Israel's recognition of Somaliland highlights the strategic importance of the Gulf of Aden coastline near the Bab el-Mandeb Strait, one of the most critical maritime chokepoints in global trade.

Ports and logistics infrastructure along this coastline are increasingly viewed as potential gateways linking the Indian Ocean, the Red Sea and emerging African markets. In this context, the Red Sea and the Horn of Africa remain strategically important regardless of how IMEC ultimately develops.

Multiple powers are already competing for influence across the region. China operates its first overseas military base in Djibouti. The United States and several European countries maintain military facilities there as well. Turkey runs a military training base in Somalia, while the United Arab Emirates has invested heavily in ports along the Red Sea coastline.

The Horn's strategic importance is reinforced by Ethiopia's growing demographic and economic weight. With more than 120 million people, Ethiopia hosts the headquarters of the African Union and the continent's largest aviation hub through Ethiopian Airlines.

AFTER THE IRAN WAR

How the Iran conflict ultimately unfolds will shape the strategic environment surrounding the Red Sea and Africa. If the Iranian regime survives, proxy competition could intensify across the Red Sea basin, with Iranian-aligned actors threatening shipping routes and prompting greater security involvement from Gulf states and global powers. If the regime collapses, Gulf countries may expand their economic and security presence westward across the Red

Sea, accelerating investment in ports, logistics infrastructure and regional connectivity across East Africa.

AFRICA'S STRATEGIC MOMENT

Uncertainty surrounding IMEC could further increase Africa's importance. If political shifts or regional tensions slow the corridor's development, global actors may increasingly look toward alternative logistics routes linking the Indian Ocean, the Gulf and the Mediterranean through Africa itself. Investments in ports, rail corridors and digital infrastructure along Africa's coasts could therefore serve as complementary pathways for global trade.

Regardless of how the conflict unfolds, Africa's strategic importance will continue to grow. The Iran war did not create this shift, but it is accelerating it.

In the emerging contest over trade routes, resources and influence, the Red Sea and the Horn of Africa may once again become one of the decisive geopolitical crossroads of the twenty-first century. *

SHIRI FEIN-GROSSMAN

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MELANIA TRUMP THE QUIET ARCHITECTURE OF REINVENTION

BY ALICIA POWE

There are memoirs that simply recount events, and there are memoirs that seek to shape the meaning of a life. Melania belongs to the second category. It is not merely the recollection of a woman who lived near power. It is the deliberate portrait of a figure who crossed borders, built a life in America, and entered one of the most visible roles in the world while preserving an unusual sense of privacy and control.

To present this book well, one must begin there: not with celebrity, and not with politics alone, but with the deeper structure of reinvention.

Melania Trump's story carries a distinctly American resonance precisely because it began elsewhere. Born in Slovenia, she came to the United States, built a life in New York, became an American citizen, and ultimately entered history as First Lady of the United States. That trajectory alone gives her story a singular place in the American imagination. Hers is not the story of inherited political lineage or institutional apprenticeship. It is a story of movement, adaptation, and ascent.

In that sense, Melania can be read not only as a memoir, but as an immigrant success story written from within history rather than from its margins.

The book is presented as an intimate account of the chapters that formed her. It takes readers from her Slovenian childhood to the world of fashion in Europe and New York, then into courtship, motherhood, public life, and the White House. It also reflects on advocacy and the causes closest to her heart. This matters because it shows that Melania is not being offered as a

narrow political memoir, but as a broader act of self-definition: part life story, part reflection, part composed visual narrative.

That is why the book should be introduced with elegance rather than excess. The temptation, with any memoir by a First Lady, is to reduce it either to proximity to power or to public image. But Melania invites a more serious reading. What emerges is a woman intent on being seen not simply as the spouse of a president, but as a person shaped by her own choices, her own discipline, and her own inner code.

Perhaps the most revealing phrase associated with the memoir is that Melania Trump has lived "on her own terms." That brief line captures the essential posture of the book. It suggests not performance, but authorship. It suggests a woman who has moved through highly visible worlds while insisting on the right to define herself.

The structure of the memoir follows the classic arc of transformation. It begins with origin: family, childhood, and early formation in Slovenia. It then turns to ambition and transition: fashion, Europe, and the decisive step toward New York. From there, it enters the realm of public scrutiny: her meeting with Donald Trump, courtship, marriage, motherhood, and the pressures of life at the center of American politics. Finally, it turns toward reflection: what it meant to inhabit the role of First Lady, what causes mattered to her, and how she wishes that chapter of her life to be remembered.

In that sense, the memoir offers more than chronology. It offers design. It presents a life not as a sequence of accidents, but as a succession of transformations held together by self-command.

What gives the book much of its force is precisely this idea of reserve as strength. In a public culture that often rewards confession,

overexposure, and constant explanation, Melania Trump has long projected something different: restraint, composure, and selective disclosure. Melania does not seem to abandon that style. Rather, it refines it. The memoir is better understood as a controlled opening than as a full unveiling. It does not seek catharsis so much as perspective. It is not the surrender of privacy, but the disciplined management of it.

That distinction gives the book much of its dignity and much of its intrigue.

The immigrant dimension of the memoir is especially compelling. America continues to be shaped by stories of arrival and reinvention, but few such stories culminate in the East Wing of the White House. That is why Melania Trump's journey carries symbolic weight beyond partisan interpretation. Before there was political symbolism, there was the long labor of adaptation: a new country, a new language, a new social world, and a new identity formed under the gaze of others.

Melania therefore speaks to something larger than office. It is about the discipline required to remain oneself while entering institutions powerful enough to define a person from the outside.

The memoir also appears intent on underscoring her independence of mind. One of the most discussed aspects of the book is its insistence on individual conviction and freedom. Whatever one's politics, the significance for the memoir is unmistakable. The book positions her as a figure with convictions of her own. It asks readers to see her not merely as an accessory to power, but as a woman with her own judgments, her own moral language, and her own sense of self-possession.

That element gives the memoir seriousness. It reminds the reader that Melania Trump wishes to be understood not as a symbol alone, but as a person with agency.

There is also a visual intelligence to the project that should not be overlooked. Melania is clearly conceived not only as text, but as image. It is a composed self-portrait in the fullest sense: narrative, visual, and symbolic. That aesthetic

element reinforces the larger impression that Melania Trump understands memoir as presentation as much as disclosure. She is not only telling a story; she is arranging the terms on which that story is encountered.

In an age when public figures are often flattened into headlines and caricatures, that instinct for composition gives the book a distinctive texture.

To present Melania convincingly, then, is to present it as more than a political memoir and more than a celebrity book. It is the account of a woman who crossed borders without surrendering self-command, who entered history without fully giving herself over to spectacle, and who now offers readers her own version of the journey.

She is the First Lady, yes. But she is also an immigrant, a mother, and a self-made woman whose story reflects ambition, discipline, and endurance. That is the strongest frame for the book, and perhaps the fairest one.

In the end, Melania deserves to be read as the testimony of a woman who chose authorship over passivity. It is the story of a life built across continents, refined in public view, and narrated with deliberate control. For readers, that is the memoir's true appeal. It offers not only access to the world of a First Lady, but insight into the making of a woman who insists on being understood in her own light.

And that is why Melania matters. It is not simply the memoir of a public figure. It is the portrait of a woman who composed her place in America with grace, resilience, and unmistakable will. *

ALICIA POWE

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