

Speculating on the Summit in Saudi Arabia

by George Friedman - February 17, 2025

At its heart, Geopolitical Futures is a forecasting company. But before we forecast, we analyze. And before we analyze, we speculate. We rarely publish our speculations, because they are ultimately errant thoughts meant to make sense of chaos. Worse yet, they are often wrong. But as U.S. President Donald Trump and Russian President Vladimir Putin prepare to meet in Saudi Arabia, I thought it worthwhile to speculate, especially since we recently forecast that the world order is restructuring itself. As always, the normal caveats apply.

I am unable to understand Trump's repeated desire to occupy Gaza. Trump knows that taking over Gaza would be impossible without a military presence, and he knows that a stream of casualties flowing back to the United States, where a new round of Islamist militarism could take root, would utterly undermine his presidency. So I initially wrote the Gaza statements off as a low-cost bluff.

It makes sense that Trump and Putin would want to talk about and likely move toward a bilateral settlement on Ukraine. It's unusual that they decided to exclude European leaders, including Ukrainian President Volodymyr Zelenskyy, from the talks, especially since Trump has long characterized the Ukraine war as a European war. Perhaps Trump thinks European attendance would be a de facto invitation for Europe to participate in Ukraine's reconstruction. Perhaps he believes bringing Europe to the table, with all its many divergent views and interests, would bring the talks to a halt. Perhaps he means to signal intentions to redefine relations with Russia or Europe. (It is likely Putin feels the same.) And maybe they wanted to exclude Zelenskyy because they knew he wouldn't agree to anything they discussed. Besides, there may be more subjects discussed between Trump and Putin at the meeting than Ukraine.

Notably, France has since called a summit of selected European nations to discuss the issue. Which makes sense: Europe was secure and prosperous during and after the Cold War, but that security and prosperity have begun to fray. A reconciliation of any sort between the U.S. and Russia removes what was Europe's anchor. The stalemate in Ukraine, Russia's failure to win and the limited U.S. and European responses signaled the end of the post-Cold War era. Russia failed to overwhelm in days or weeks a smaller and weaker country – which the old Russia would have done. Russia must redefine its national strategy based on this reality. This gives the United States a need to redefine its own strategy. Relationships are now forced to change.

My reasoning on all this might be wrong, but at least some of it seems plausible. What's surprising is the location for the talks. Putin and Trump couldn't meet in Moscow or Washington, of course, as neither could visit the other without appearing weak. But there are plenty of other places they could choose, including Hungary, whose prime minister, Victor Orban, has excellent relations with both Trump and Putin. Unless they wanted to just go somewhere warm, it's hard to understand why it ought to be Saudi Arabia. Importantly, Trump's secretary of state, national security adviser and Middle East envoy are going to hold parallel meetings with their Russian counterparts. This preliminary meeting will likely result in a common plan, already roughly sketched out, that the official Trump-Putin summit will serve to bless.

This brings us back to the mystifying emphasis that Trump has placed on Gaza, talking up the impossible idea of the U.S. taking ownership of what is essentially a death trap. There are three issues on the table. The first is Ukraine. The second is the Arab-Israeli conflict. The third and most important is seeking an accommodation with Russia, not only in Ukraine but also globally. In the end, the significance of the Ukraine war was tragically not Ukraine. It was a measure of Russian power and the unwillingness of the United States and Europe to do more than give aid. What would have been a nuclear standoff during the Cold War never came close to escalating to that level for this reason. No one's interest in Ukraine rose that high. The rivalry between Moscow and Washington played out countless times in the Middle East, and the Saudis, who have never been more than reluctant sponsors of the Palestinians, diffused their confrontations and frequently played one side against the other.

If Saudi Arabia has a coalition comprising the U.S. and/or Russia, its economic domination of the region becomes strategic domination. Riyadh would be able to contain the Arab-Israeli war, as well as other regional conflicts. The threat of a U.S.-Russia confrontation in the most volatile region in the world would subside, and each would be free to form an economic relationship that, incidentally, marginalizes and even potentially threatens European unity.

It seems to me that this is the only coherent explanation of recent events. Of course, that assumes recent events are coherent, or that coherence is a sign of accuracy. But for the moment, I believe every word since it coheres with our view of a world redesigning itself. I think Trump sees a possibility of entente with Russia – which Putin would welcome. Allied with their joint backing, peace in the region becomes a conceivable possibility, considering the economic benefits to three great oil producers each without material conflict.

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