By Peter Zeihan

In recent weeks, STRATFOR has explored how the U.S. government has been seeing its interests in the Middle East and South Asia shift. When it comes down to it, the United States is interested in stability at the highest level — a sort of cold equilibrium among the region's major players that prevents any one of them, or a coalition of them — from overpowering the others and projecting power outward.

One of al Qaeda's goals when it attacked the United States in 2001 was bringing about exactly what the United States most wants to avoid. The group hoped to provoke Washington into blundering into the region, enraging populations living under what al Qaeda saw as Western puppet regimes to the extent that they would rise up and unite into a single, continent-spanning Islamic power. The United States so blundered, but the people did not so rise. A transcontinental Islamic caliphate simply was never realistic, no matter how bad the U.S. provocation.

Subsequent military campaigns have since gutted al Qaeda's ability to plot extraregional attacks. Al Qaeda's franchises remain dangerous, but the core group is not particularly threatening beyond its hideouts in the Afghan-Pakistani border region.

As for the region, nine years of war have left it much disrupted. When the United States launched its military at the region, there were three balances of power that kept the place stable (or at least self-contained) from the American point of view. All these balances are now faltering. We have already addressed the Iran-Iraq balance of power, which was completely destroyed following the American invasion in 2003. We will address the Israeli-Arab balance of power in the future. This week, we shall dive into the region's third balance, one that closely borders what will soon be the single largest contingent of U.S. military forces overseas: the Indo-Pakistani balance of power.

Pakistan and the Evolution of U.S. Strategy in Afghanistan

U.S. strategy in Afghanistan has changed dramatically since 2001. The war began in the early morning hours — Pakistan time — after the Sept. 11 attacks. Then-U.S. Secretary of State Colin Powell called up then-Pakistani President Gen. Pervez Musharraf to inform him that he would be assisting the United States against al Qaeda, and if necessary, the Taliban. The key word there is "inform." The White House had already spoken with — and obtained buy-in from — the leaders of Russia, the United Kingdom, France, China, Israel and, most notably, India. Musharraf was not given a choice in the matter. It was made clear that if he refused assistance, the Americans would consider Pakistan part of the problem rather than part of the solution — all with the blessings of the international community.

Islamabad was terrified — and with good reason; comply or refuse, the demise of Pakistan was

an all-too-real potential outcome. The geography of Pakistan is extremely hostile. It is a desert country. What rain the country benefits from falls in the northern Indo-Pakistani border region, where the Himalayas wring moisture out of the monsoons. Those rains form the five rivers of the Greater Indus Valley, and irrigation works from those rivers turn dry areas green.

Accordingly, Pakistan is geographically and geopolitically doomed to perpetual struggle with poverty, instability and authoritarianism. This is because irrigated agriculture is far more expensive and labor-intensive than rain-fed agriculture. Irrigation drains the Indus' tributaries such that the river is not navigable above Hyderabad, near the coast — drastically raising transport costs and inhibiting economic development. Reasonably well-watered mountains in the northwest guarantee an ethnically distinct population in those regions (the Pashtun), a resilient people prone to resisting the political power of the Punjabis in the Indus Basin. This, combined with the overpowering Indian military, results in a country with remarkably few options for generating capital even as it has remarkably high capital demands.

Islamabad's one means of acquiring breathing room has involved co-opting the Pashtun population living in the mountainous northwestern periphery of the country. Governments before Musharraf had used Islamism to forge a common identity for these people, which not only included them as part of the Pakistani state (and so reduced their likelihood of rebellion) but also employed many of them as tools of foreign and military policy. Indeed, managing relationships with these disparate and peripheral ethnic populations allowed Pakistan to stabilize its own peripheral territory and to become the dominant outside power in Afghanistan as the Taliban (trained and equipped by Pakistan) took power after the Soviet withdrawal.

Thus, the Americans were ordering the Pakistanis on Sept. 12, 2001, to throw out the one strategy that allowed Pakistan to function. Pakistan complied not just out of fears of the Americans, but also out of fears of a potentially devastating U.S.-Indian alignment against Pakistan over the issue of Islamist terrorism in the wake of the Kashmiri militant attacks on the Indian parliament that almost led India and Pakistan to war in mid-2002. The Musharraf government hence complied, but only as much as it dared, given its own delicate position.

From the Pakistani point of view, things went downhill from there. Musharraf faced mounting opposition to his relationship with the Americans from the Pakistani public at large, from the army and intelligence staff who had forged relations with the militants and, of course, from the militants themselves. Pakistan's halfhearted assistance to the Americans meant militants of all stripes — Afghan, Pakistani, Arab and others — were able to seek succor on the Pakistani side of the border, and then launch attacks against U.S. forces on the Afghan side of the border. The result was even more intense American political pressure on Pakistan to police its own militants and foreign militants seeking shelter there. Meanwhile, what assistance Pakistan did provide to the Americans led to the rise of a new batch of homegrown militants — the Pakistani Taliban — who sought to wreck the U.S.-Pakistani relationship by bringing down the government in Islamabad.

The Indian Perspective

The period between the Soviet collapse and the rise of the Taliban — the 1990s — saw India at

a historical ebb in the power balance with Pakistan. The American reaction to the Sept. 11, 2001, attacks changed all that. The U.S. military had eliminated Pakistan's proxy government in Afghanistan, and ongoing American pressure was buckling the support structures that allowed Pakistan to function. So long as matters continued on this trajectory, New Delhi saw itself on track for a historically unprecedented dominance of the subcontinent.

But the American commitment to Afghanistan is not without its limits, and American pressure was not sustainable. At its heart, Afghanistan is a landlocked knot of arid mountains without the sort of sheltered, arable geography that is likely to give rise to a stable — much less economically viable — state. Any military reality that the Americans imposed would last only so long as U.S. forces remained in the country.

The alternative now being pursued is the current effort at Vietnamization of the conflict as a means of facilitating a full U.S. withdrawal. In order to keep the country from returning to the sort of anarchy that gave rise to al Qaeda, the United States needed a local power to oversee matters in Afghanistan. The only viable alternative — though the Americans had been berating it for years — was Pakistan.

If U.S. and Pakistan interests could be aligned, matters could fall into place rather quickly — and so they did once Islamabad realized the breadth and dangerous implications of its domestic insurgency. The five-year, $7.5 billion U.S. aid package to Pakistan approved in 2009 not only helped secure the arrangement, it likely reflects it. An unprecedented counterinsurgency and counterterrorism campaign conducted by the Pakistani military continues in the country's tribal belt. While it has not focused on all the individuals and entities Washington might like, it has created real pressure on the Pakistani side of the border that has facilitated efforts on the Afghan side. For example, Islamabad has found a dramatic increase in American unmanned aerial vehicle strikes tolerable because at least some of those strikes are hitting Pakistani Taliban targets, as opposed to Afghan Taliban targets. The message is that certain rules cannot be broken without consequences.

Ultimately, with long experience bleeding the Soviets in Afghanistan, the United States was inherently wary of becoming involved in Afghanistan. In recent years, it has become all too clear how distant the prospect of a stable Afghanistan is. A tribal-ethnic balance of power overseen by Pakistan is another matter entirely, however. The great irony is that such a success could make the region look remarkably like it did on Sept. 10, 2001.

This would represent a reversal of India's recent fortunes. In 10 years, India has gone from a historic low in the power balance with Pakistan to a historic high, watching U.S. support for Pakistan shift to pressure on Islamabad to do the kinds of things (if not the precise actions) India had long clamored for.

But now, U.S. and Pakistani interests not only appear aligned again, the two countries appear to be laying groundwork for the incorporation of elements of the Taliban into the Afghan state. The Indians are concerned that with American underwriting, the Pakistanis not only may be about to re-emerge as a major check on Indian ambitions, but in a form eerily familiar to the sort of state-militant partnership that so effectively limited Indian power in the past. They are

right. The Indians also are concerned that Pakistani promises to the Americans about what sort of behavior militants in Afghanistan will be allowed to engage in will not sufficiently limit the militants' activities — and in any event will do little to nothing to address the Kashmiri militant issue. Here, too, the Indians are probably right. The Americans want to leave — and if the price of departure is leaving behind an emboldened Pakistan supporting a militant structure that can target India, the Americans seem fine with making India pay that price.