

Saudi Arabia-Pakistan defence pact: Implications for India

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Abstract

Pakistan and Saudi Arabia have recently stepped up their defence and security cooperation by entering into a Strategic Mutual Defence Agreement (SMDA). Pakistan claims that the agreement includes nuclear cooperation apart from mutual defence clauses. The agreement has an impact on the Indian strategic thinking and action as it could affect the strategic environment of South Asia with emboldened Pakistan drawing Saudi Arabia into its conflict with India, engaging in mischievous acts like terror funding backed by Saudi money and support, and denting of India's relation with the Gulf region. India's guarded position on SMDA indicates its preference to analyse the implications of the agreement first. However, a closer observation of the long relationship between Pakistan and Saudi Arabia suggests the dilution of the past agreements by geopolitical perceptions and weak ideological bases. The SMDA is unlikely to affect India's position as Saudi Arabia is becoming sensitive to the Indian strategic requirements, and Pakistan will not be able to have its way. However, India needs to be on its guard, sustain good relations with the Gulf region and Saudi Arabia to avoid the SMDA impacting the strategic interests of India.

Key Words: SMDA, Pakistan-Saudi Arabia, Pakistan Defence Pact, India-Pakistan

Saudi Arabia and Pakistan signed the Strategic Mutual Defence Agreement (SMDA) on 17th September 2025, upgrading and formalising their longstanding defence and security cooperation. For Pakistan, the agreement provides a new direction in its bilateral relations with Saudi Arabia with the incorporation of collective security provisions, as well as leverage to reclaim its position in the Gulf region, dented by growing Indian influence in the region. Although the full agreement is not yet put in the public domain, Pakistan is proclaiming that the agreement includes nuclear aspects. This new profile of Pakistan, along with its increasing bond with the US and China has made the Indian strategic calculus complex. The agreement is likely to impact the geo-political structure of South Asia and the way India manages Pakistan. Nonetheless, it has to be noted that Pakistan and Saudi Arabia had military relations for long, and the geo-political compulsions of both have given it a solidarity base. Hence, in the fitness of things, it becomes pertinent to grasp the nature of their long relationship before evaluating the SMDA and its implications.

Background: Both Pakistan and Saudi Arabia, predominantly the Sunni countries, are members of the Organisation of Islamic Cooperation (OIC), and have close economic and security relations, with religion providing the impetus. The defence and security exchanges between the two could be traced

back to 1961, when Pakistan supplied arms to Saudi-backed loyalist forces in Yemen. The first official agreement between the two was signed in 1967, in which Pakistan agreed to train Saudi armed forces. Saudi Arabia was one of the strongest supporters of Pakistan in its war with India in 1971.¹ Especially, in the 1970's Pakistan became a major beneficiary of Saudi economic and financial assistance. It received \$502 million as a loan and another \$200 million in special assistance in 1978-79 at a time when Pakistan was struggling to meet its international financial obligations.² The volume of assistance subsequently saw an upward turn. This relation gained momentum with developments in late 1970s that among others included the "Islamic revolution" in Iran in 1979, which brought into power the anti-west and anti-Israel regime led by new Shiite Islamic revolutionary leader, Ayatollah Khomeini.

On 20th November 1979, Islamic hardliner militants with a grouse against the modernist aspects in Saudi rule seized the Grand Mosque in Mecca, plunging the country into crisis. Saudis had tough time in dealing with the crisis, and the militants were finally neutralised with the French help, exposing the inability of the Saudis to handle the emergency. Prompted by Saudi establishment critic and Iran's supreme leader, Ayatollah Khomeini's statements that the Saudi hereditary monarchy was incompatible with Islam, in Eastern Saudi Arabia the minority Shiite community rose in revolt (Qatif Uprising) against Saudi regime in late November 1979.³ In dealing with internal and external challenges, Saudi's were supported Pakistan. Pakistan's military dictator, Zia-ul-Haq, who had already started the radical Islamisation process in Pakistan, seized the opportunity to build closer relations with Saudi Arabia, reach out to other Arab countries, to have strategic depth in Afghanistan, and to counter Iran's Islamic revolution, all of which basically rested on a Sunni radical Islamic foundation. Consequently, Pakistan deployed about 15000 soldiers for the defence of Saudi Arabia in the 1980s, apparently to defend the kingdom from internal and external threats.⁴

This gesture was reciprocated by Saudi Arabia, that has adopted a soft approach towards religious preaching post-1979 revolt, with increased flow of resources to Pakistan, funding of madrassas preaching Wahhabism/Salfism, especially to counter the Shiite Iran's influence and funding of training Afghan mujahedeen in Pakistan in the backdrop of Soviet intervention in Afghanistan, all which provided an opportunity to Pakistan to strengthen its relations with the Arab world.⁵

However, this relationship was not without strains and frictions. In 2015, when Saudi Arabia initiated a military intervention in Yemen against Houthi rebels backed by Iran and asked Pakistan to supply men and materials, Islamabad backed out, foreseeing the confrontation with a third enemy-Iran, when its troops were already stationed on the borders of India and Afghanistan, and military operations were going on in its tribal areas against al-Qaeda and Taliban elements.⁶ This annoyed the Saudi Arabia. Similarly, alarmed by Qatar's overtures to Iran and position on the Muslim

Brotherhood, when Saudi Arabia and other GCC states severed ties with Qatar on 5 June 2017, Pakistan once again adopted a neutral position. Only in 2018, Pakistan decided to deploy its troops in Saudi Arabia to take part in the Yemen conflict.⁷ Likewise, Pakistan abstained from participation in Kuala Lumpur summit in 2019 to avoid the wrath of Saudi Arabia that apprehended the challenge to its leadership in Muslim world and undermining of OIC by the new platform initiated by Malaysia and Turkey with the support of Pakistan, clearly showing the influence Saudi Arabia wielded on Pakistan's policy.⁸

Saudi Arabia pursued the policy it deemed fit in the context. For instance, Saudi Arabia keen on expanding its relations beyond the region, has gone soft on Kashmir issue mainly due to India's growing economic clout. Pakistan was upset when Saudi Arabia, turned down its request to convene a special meeting of the Council of Foreign Ministers of the OIC to discuss Kashmir.⁹ It even made efforts to bring India into the OIC orbit.¹⁰ Irked by Pakistan's tilt towards Turkey and Malaysia who have emerged as new leaders in the Islamic world, and in response to the Pakistani criticism that Saudi led OIC is not pressurising India on the Kashmir issue, Saudi Arabia in August 2020 demanded the return of the US\$ 3 billion loan that it had given as a part of US\$ 6.2 billion loan package (\$3 billion in loans and oil credit facility of \$3.2 billion) to the cash-strapped Pakistan in November 2018 and, refused to sell oil to Islamabad on deferred payment.¹¹ Pakistan immediately returned \$1 billion to the Saudis, signalling a distancing from Saudi's. Pakistan's image in Saudi Arabia, is being increasingly dented, notwithstanding the religious convergence..

Therefore, a closure look at the relation between two suggest that alignments were affected when national priorities and perceptions varied and the deep ideological bond is apparently missing. The modernist Saudi Vision 2030 document, announced on 25 April 2016, aims at making the kingdom a global investment hub with a vibrant society through the greater diversification in economic and social sectors.¹² As Andrew Leber notes, "the Vision 2030 has supremely ambitious goals, from de-centering religion as the focal point of Saudi identity and daily life to centering Saudi Arabia within the world as an economic and geopolitical powerhouse."¹³ In other words, although religion is an important aspect in Saudi structure, the forward looking vision of present Saudi leadership hardly provides space for Pakistan or other Islamic countries to base their relations solely on religious foundation.

Pakistan and Saudi Arabia Strategic Mutual and Defence Agreement (SMDA): The SMDA formalises the military cooperation both held for long amidst major developments in the West Asian region and around. The SMDA was signed on 17th September 2025; just few days after Israeli attack (9th September 2025) on Hamas base in Qatar. Although the ground work has begun much earlier the agreement was essential for both. Saudi Arabia was concerned about the Iran and Israeli strikes (on June 2025 and September 2025 respectively) on Doha, uncertainty over the future of Tehran's

nuclear programme, and clashes between India and Pakistan in May 2025. In the backdrop of increasing Israeli power and assertion in the region, Saudi's were apprehensive about the American security guarantees and felt the need to diversify its sources of security.¹⁴

Saudi Arabia in the past had relied on its partnership with the US and supply of advanced military hardware and training; but several US decisions, including non-retaliation after 2019 Houthis strikes on Abqaiq oil facilities, the 2021 withdrawal of missile defences, the end of the support for Saudi operations in Yemen, and, in particular, Israeli attack in Doha weakened Saudi's confidence on the US.¹⁵ Search for additional security sources- not as a replacement of US support- naturally become the priority. It was hoped that in return for Saudi Arabia's financial assistance, Pakistan would extend its nuclear umbrella to Saudi Arabia that would alter the strategic scenario in West Asia and revive Saudi's position vis-à-vis Israel, Iran and Islamic world, dented by increasing aggressions of Israel.

The agreement served many purposes - reassuring domestic and regional audience of Saudi's ability to deter aggression, deterring Iran from acquiring or using nuclear weapons; hedging against American withdrawal from the region, and protecting the kingdom's borders against countries like Yemen.¹⁶ The US and Israel have not officially commented on the treaty, but the treaty has become an indicator of the new scenario emerging in West Asia in the context of increasing Israeli assertions, distressed Iran and uncertainties over the US involvement. It significantly reflect the tacit approval of the US towards a new scenario in West Asia where Arabs unite, Saudi diversify its security sources but don't develop nuclear arsenal of their own to destabilise Israel, Pakistan become a security provider in West Asia and checkmate Iran.

For Pakistan, the worsening economic and military situation had its own say in the making of the treaty. With tough IMF-mandated adjustment benchmark implementation from July 2022 affecting the economy and raise in unemployment rate and people below poverty line, Pakistan was desperately looking for economic support.¹⁷ Adding to the woes was its conflict with India in May 2025 making it worry about the resources for further military build-up. The safe bet was to have a tie-up with the Saudis. The pact, therefore, was strategically important for Pakistan as it transformed its position as recipient of financial support from Saudi Arabia to that of a partner in security relations. The defence clause provided a leverage against Indian attack and to reach out to Gulf countries against the increasing influence of India in the Gulf region.¹⁸

Guided by their own strategic calculations, both reached an agreement and signed SMDA on 17th September 2025 during state visit of Pakistani Prime Minister, Shehbaz Sharif to Saudi Arabia. The full details of SDMA is not put in the public realm. But the press briefing and other statements suggest that it has broadly two dimensions. The first relates to the collective defence provisions,

which states that “any aggression against either country shall be considered an aggression against both.” The second relates to the intent of stepping up cooperation from military to economic areas. The debatable part is Pakistan’s assertion that the cooperation includes all aspects of defence including atomic sector.¹⁹ There is no official statement from Saudi Arabia on this aspect although its sources have hinted at this possibility.²⁰ The ambiguity could be intentional to keep adversaries guessing. Nevertheless, subsequent to the signing of the agreement, Pakistan encouraged by continued support of China and the recent upturn in its relation with the US has been stressing on mutual defence clause in order to enhance its status and elicit backing from others, presuming another conflict with India.²¹

Both perceive advantages and a symbolic rise in positions. But the outcome may not be on expected lines. As reflected in Vision 2030, Saudi Arabia wishes to consolidate its leadership position in the Arab world, which requires regional stability. Saudi Arabia has been pursuing this goal with military backup and religion as an impetus. But defence pacts in the past in this direction, including with Pakistan, have often run into a rough terrain. The Treaty of Joint Defence and Economic Co-operation (1950), Baghdad Pact (1955), Arab-Islamic extraordinary Doha summit (2025) and Gaza Peace Summit (Sharm El Sheikh Summit, 2025) are just few cases of examples of efforts fizzling out with pursuit geopolitical interests coupled with weak ideological commitments and becoming mere symbolic exercises. Therefore, the materialisation of “aggression clause”, especially when confronting strong parties like India, raises questions.

Implications for India: India has chosen not to comment on the agreement. It has indicated that the treaty will be carefully analysed, but hopes that Saudi Arabia would take note of “mutual interests and sensitivities’ given the multi-dimensional strategic partnership of India with Saudi Arabia.²² Notwithstanding the guarded response of India, the agreement has implications for India’s strategic thinking and choices. One area of concern is aligning of Indian subcontinent with the Gulf region by this agreement anchored on Pakistan, and the impact it would have on India’s relation with Gulf countries, especially with the UAE and Saudi Arabia, which India has meticulously built over the years.

The Saudis, in particular, have played a crucial role in bringing the temperature down following 2019 Pulwama attack, 2025 Pahalgam attack and the post-Pahalgam crisis.²³ But in the changed context, there is a concern whether the Saudi Arabia could be treated as neutral party and whether it will continue to provide financial and diplomatic support to Pakistan and oil in case of a long-drawn conflict with Pakistan, besides dampening India’s efforts to isolate Pakistan in South Asia and the Gulf. Besides Saudi investment in India, there are over 2.6 million Indian community in Saudi with substantial remittance back to India, and in India’s plan for India-Middle East-Europe Economic Corridor (IMEC), Saudi is an important player. The choice of politically unstable Pakistan

as a security partner by the Saudis and its impact on India-Saudi relations that have witnessed upward trend recently is a matter of concern.

The other concern is also that the agreement may strengthen Pakistan's geopolitical position and its adamant behaviour towards Kashmir, Terrorism and water right issues. The flow of resource and oil to Pakistan could also help Pakistan to modernise its armed forces that would exert pressure on India. In order to meet the challenges posed by emboldened Pakistan, India may require to further modernise its military incorporating new warfare elements like Drones, Cyber space, and AI, all of which will have financial and diplomatic pressures on India. There is also disquiet about the possibility of Pakistan bringing any future military action under the agreement's "act of aggression" framework drawing Saudi Arabia into the conflict. Going by the past experience, the transfer of resources from Saudi Arabia getting diverted for secret terror planning and funding also cannot be ruled out. Pakistan has already recalibrated its relations with China and the US, and the agreement by providing diplomatic support will further embolden Pakistan. India needs to tread the path cautiously.

Concluding remarks: The pact will not alter the military balance in favour of Pakistan but may affect the strategic environment in which both South Asian adversaries operate. This agreement might give Pakistan certain tactical benefits, which it will use to counter India's growing influence in the West Asian region. Therefore, India needs to face these challenges by engaging Saudi Arabia in a way that it continues to value its cooperation with India, and the pace would be maintained notwithstanding the SMDA. This would not only enable Saudis to continue their soft approach towards India even during crisis situation and prevent any nefarious designs of Pakistan.

Further, it has to be noted that unlike NATO structure which specify the context of "armed attack" necessitating collective response, the SMDA broadly refers to 'any aggression' that could involve terrorism, minor attacks etc. Pakistan may wish to involve the partner to widen the scope of its conflict with India by using this clause. But given the signals emanating from the Saudi Arabia in recent times, Pakistan may not be successful in rolling-in the Saudi Arabia in its conflict with India. Therefore, SMDA may not succeed in evolving a regional political consensus to convert it into a joint defence framework against India. Even in the past, the pacts in the Gulf region have not succeeded when the parties have begun to pursue their strategic interests based on their perception. Therefore, Pakistan has significant limits in maintaining and expanding its depth in the Gulf, especially with Saudi Arabia. It would be a delusion on the part of Pakistan if it believes that the SMDA will be a game changer, strategically altering the security balance in its favour. Hence, India need to avoid any hasty reaction, at the same time, continue to work with Saudi Arabia and other gulf partners, and carefully observe emerging situation to respond appropriately in protection of its strategic interests.

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