The Pakistan-Saudi Strategic Mutual Defense Agreement: New Delhi's Calculus

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On September 17, Saudi Arabia and Pakistan announced the signing of a Strategic Mutual Defence Agreement (SMDA). While the agreement itself is not public, according to the Pakistani-Saudi joint statement, "the agreement states that any aggression against either country shall be considered an aggression against both".

India's initial response through the MEA stated that India "was aware that this development, which formalizes a long-standing arrangement between the two countries, had been under consideration" and that New Delhi will "study its implications." Later, the MEA added that since the India-Saudi Arabia strategic partnership has deepened considerably in the last few years, New Delhi expects "that our strategic partnership will keep in mind mutual interests and sensitivities." Senior Saudi officials themselves also asserted to Reuters while addressing the SMDA that "our

relationship with India is more robust than it has ever been. We will continue to grow this relationship and seek to contribute to regional peace whichever way we can."

On the question of whether the SMDA includes the possibility of Pakistan offering extended nuclear deterrence to Saudi Arabia, Pakistan's Defence Minister Khwaja Asif first suggested on September 18 that Pakistan's capabilities "will be made available" according to the agreement, but later back tracked and asserted that such capabilities were "not on the cards". Saudi officials, on the other hand, maintain that the agreement "encompasses all military means". But what does the SMDA represent for India in the short and long term?

Decoding the Agreement's Impact

From the Indian perspective, there are three inter-linked facets to the SMDA:

First, in its substance and merits, the SMDA is more Middle East facing and less South Asia facing. Second, in terms of its presentation, the deal reinforces the perception of Pakistan's surprising geopolitical ascent and increasing tally of allies. And consequently, as the third facet, India's recalibration will likely be to deepen its partnerships with Saudi Arabia and other Arab states. Each of these are considered below.

First, there is consensus in India's strategic community that Israel's strikes in Doha earlier in September, acted as the immediate trigger for the SMDA. Arab states are seen as being buoyed by the failure of implicit and institutional US security guarantees in the region. "Disenchantment with the US is at an all-time high even as they don't want to burn their bridges", according to a former Indian Ambassador to Jordan. Both the need for greater regional security integration as well as the limitations imposed on purchased US weaponry (that they cannot be used against Israel), have been supplemented by

the series of watershed events in West Asia across the last two years. Vis-à-vis India, a historical reading of Pakistan's 21st century military alliances (such as SEATO or CENTO) and their failure to significantly aid Pakistan's war efforts against India, has also animated Indian strategic analysis to assert that the deal is more Middle East facing, than South Asia facing. Such reasoning has been accompanied with a recognition of Arab frustration with states such as Israel and regional inability to end a conflict that has progressively expanded in frontiers since October 2023.

Second, numerous strategic experts, commentators and former Indian diplomats to the Middle East have pointed to this concentration of Middle Eastern motivations to de-link it from the South Asian part of the SMDA. Both the fact that Pakistan and Saudi Arabia have a strong history of military cooperation harking back to the 1950s, and that India's own robust relationship with the Kingdom has grown alongside this reality, has resulted in a rough consensus that the SMDA has arisen more out of a Saudi need for its objectives in the Middle East. Objectively, this assessment is sound. In any case, between Saudi Arabia and Pakistan, it is Riyadh that has historically influenced changes in Islamabad's policy rather than the other way around – whether historically such as in the Gulf War or more recently vis-à-vis Yemen when Pakistan placed troops in Saudi Arabia in 2018, in a volte face after earlier Parliamentary rejections in 2015.

Even within the logic of nuclear deterrence and conflict dynamics, it is the Middle Eastern conflict landscape which is affected due to the new possibility of Pakistani extended deterrence. The template for Saudi reciprocation has invariably been economic, which has continued independent of Saudi-India and India-Pakistan relations. However, there is unarguably a growing perception within India's strategic community that Pakistan's diplomatic stock has grown significantly following its near-war with India in May. This

perception was already on the rise, following Pakistan Army Chief Asim Munir's visits to Washington amidst a break down in India-US ties. Hence, while it is ahistoric to expect that Pakistan will receive significant military assistance from Saudi Arabia during a future conflict with India, Islamabad now has greater space to leverage the SMDA and its larger security partnership with Riyadh for increased diplomatic support for a wide range of possibilities vis-à-vis India. While Islamabad could potentially lobby greater diplomatic capital for the Kashmir dispute, it could also push for an increased Saudi role during crises with India and build on Riyadh's offer of playing a "trusted mediator" during the near-war in May. Beyond subtle diplomatic support for Pakistan in future such crises (potentially more escalatory), Pakistan could indeed push for emergency support and succor during hostilities with India including energy and financial support (if not military).

It is principally in the diplomatic (rather than the military) arena where the SMDA represents a fresh watershed for Pakistan's ties with the Arab world and potentially helps Pakistan to counter-balance India's own growing heft within the Gulf. Additionally, it is evident that Islamabad looks to specifically leverage security focused partnerships to increase achieve this. In the Arab-Islamic Extraordinary Summit held in Doha on September 15 in the aftermath of Israel's strikes, Pakistan specifically pushed for the creation of an Arab Islamic task force. In any case, Pakistan's former Army Chief, Gen Raheel Sharif has commanded the 43-state Islamic Military Counter-Terrorism Coalition since its formation in 2015.

For India, the outsized psychological effect of the SMDA and the prospect of more diplomatic capital flowing to Pakistan during a crisis (further denting India's insecurities vis-à-vis the international information landscape during any Indo-Pak crisis), is arguably sufficient to raise concerns. Hence,

rather than a direct effect on the South Asian conflict landscape, it is the long-term downstream effects of an increased Pakistani role in Middle Eastern and Arab security which presents a more prominent concern for New Delhi.

Implications for Indian Diplomacy

The third variable is the future impact of the SMDA on India. As a result of the first two variables, there has been no immediate impact on India-Saudi relations. Indian diplomats point to the fresh strategic depth in India-Saudi ties, such as through the Strategic Partnership Council, and India's own strategic autonomy which ensures space to weather such developments, to argue that sufficient guardrails exist in New Delhi's ties with Riyadh. However, as a result of the long-term variable, it is evident that India now has sufficient reasons to attempt scaling up its own ties with Arab states such as Saudi Arabia. A direct result of formidable economic ties between India and KSA and both states' Visions 2047 and 2030 respectively, has been twofold: First, it has resulted in Saudi Arabia breaking from its historic support to Pakistan in conflicts with India (such as in 1965 and 1971) and adopting a more neutral mediator-in-being position. Second, it has drawn investments from Arab business houses in India's Jammu and Kashmir – a direct dent to Pakistan's lobbying efforts against India's removal of J&K's special constitutional status in 2019 (which Arab states characterized as India's internal matter).

More simply put, New Delhi's increasing depth in ties with Gulf states has acted as a diplomatic wedge between Pakistan's core diplomatic needs in South Asia (on Kashmir) and the willingness of Gulf states to meet these needs fully. The history and depth of Pakistan's security partnerships with Arab states has thus far existed in its own silo. Conflicts such as that in Yemen or the joint Arab counter-terrorism effort (for both of which Pakistan has adapted to Saudi needs) have not had the watershed character as recent events in the

Middle East. Now, however, the 'strategic' scale of Pakistan's commitment to Saudi security also acts as a change in character for Saudi-Pak ties. Assuming that India's historic aversion to extended security pacts and its non-interventionist character continues, the most viable path ahead for New Delhi arguably is to deepen its own ties with Saudi Arabia and other Gulf states to boost the 'wedge' effects of its approach.

While officials from the Indian government presently maintain that the SMDA has had no effect on India's oil imports from Saudi Arabia, New Delhi could arguably increase its energy imports from the Gulf – a strategy which also fits into India's recalibration of its oil import mix as a result of US pressures vis-à-vis Russian oil exports to India and Saudi discount offers aimed at longer-term contracts with India. Moreover, India's conciliatory approach to China, despite Beijing's proven assistance to Pakistan during the May conflict, indicates New Delhi's continued preference for wedge diplomacy. Essentially, even if the SMDA does not have immediate short-term effects, India's long-term priority will be to prevent a West-facing agreement from yielding East-facing benefits for Pakistan.