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## THE SAUDI-PAKISTAN STRATEGIC MUTUAL DEFENCE AGREEMENT (2025): IMPLICATIONS FOR REGIONAL SECURITY AND EMERGING MULTIPOLARITY

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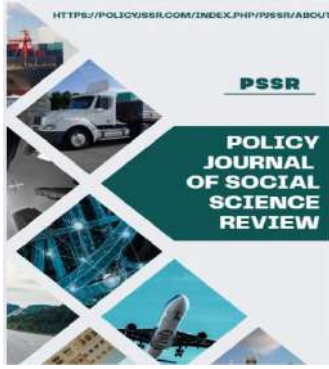
Dr. Himad Ali

### ABSTRACT

*The signing of the Saudi-Pakistan Strategic Mutual Defence Agreement in 2025 is a historic event in the Gulf-South Asia architecture of security and has far-reaching consequences to the stability in the region, the balance of deterrence, and the multipolar international system of the 2021s. A qualitative, exploratory research design in an interpretivist epistemological context was used in this work to investigate these implications using the insights of elite practitioners and scholars with a direct interest in regional security affairs. The purposive and elite sampling methods helped to recruit and engage 18 key informants, who are defense analysts, foreign policy specialists, military scholars, retired diplomats, and international relations academics, using semi-structured and in-depth interviews. To triangulate primary interview data, qualitative document analysis of official agreement texts, policy papers, think tank reports, and diplomatic communiqués was carried out. Data collected were then analyzed through the themes framework of thematic analysis developed by Braun and Clarke and formed four main themes; strategic alignment and deterrence, regional security dynamics, emerging multipolarity, and the economic-security nexus. Results indicate that this deal is a multidimensional strategic tool that serves the interests of Saudi Arabia in deterrence depth and Pakistan in stabilizing its economy, and at the same time, rebalances regional power politics in a manner that destabilizes Iranian threat perceptions, challenges Indian strategic placements, and helps to fuel progressive destabilization of U.S.-centric security constructs along the Gulf-South Asia axis. The paper concludes that the treaty constitutes a commodity as well as a catalyst of world multipolar changes with immense implications to international security regulating, nuclear risk control, and domestic diplomatic order.*

**Keywords:** Saudi-Pakistan defence agreement, regional security, multipolarity, Gulf security architecture, deterrence, nuclear ambiguity, geopolitics, South Asia, qualitative research, international relations.

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## 1. Introduction

The signing of the Saudi-pakistan strategic mutual defensive agreement in 2025 is an important inflexion point in the geopolitical course of the wider Gulf-South Asia security complex. Following decades of bilateral relations that have been marked by labor migration, monetary flows, military co-operation, and mutual Sunni Islamic identity, the 2025 accord takes what had hitherto been a complex yet unformalized relationship to a new level of a formalised strategic defence pact (Riedel, 2023). The agreement lays the groundwork of mutual defence cooperation, intelligence sharing, joint military exercises, coordination in counter-terrorism, and most importantly the conditional mutual security guarantees that bring up important concerns about whether the nuclear deterrence capability of Pakistan can be extended to cover the strategic defence needs of Saudi Arabia.

The time of the contract is no accident. It comes up in a backdrop of an enormous geopolitical restructuring in the Middle East and beyond. Beijing-brokered Saudi-Iranian rapprochement temporarily lowered the bilateral tensions, but has not changed a fundamental perception of Saudi threats to Iranian regional ambitions, especially in Yemen, Lebanon, and the broader Levant (Parsi, 2024). The failure of the U.S.-Saudi-Israeli normalization system due to the Hamas attacks in October 2023 and the ensuing Gaza war has provided strategic uncertainty in the kingdom, leading to a

renewed focus in diversifying Saudi Arabian security alliances outside of its long-standing historical monolithic security relationship with the United States (Kostiner, 2024). Pakistan, at the same time, is experiencing acute economic strains, which, in turn, have brought the Gulf financial relations, such as Saudi investments, remittance inflows, and favorable energy conditions, to the stability of the Pakistani economic and political system.

The agreement therefore indicates a meeting point of strategic interests where Saudi Arabia aims to have depth of deterrence against their state enemies (primarily Iran) and non-state actors and Pakistan aims to have economic lifelines, diplomatic assistance and strategic relevance in an ever growing multipolar world. The meeting of these interests results in a security setup with ripple effects felt beyond the bilateral dyad to include the regional security setup of the whole Gulf-South Asia corridor, whose ripple effects are felt in the strategic calculations of India, Iran, China, Turkey, and the United States (Haider & Javaid, 2024).

The idea of emerging multipolarity offers an effective analytical perspective to place the Saudi-Pakistan agreement in the context of the wider structural changes in international order. A unipolar moment of the post-Cold war, marked by the dominance of the U.S. military and institutions, is being replaced by a more violent, competitive international system where China, Russia, regional forces, and



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middle-level alliances among middle powers are redefining the global security governance architecture (Mearsheimer, 2019). The Saudi-Pakistan agreement is both a symptom and an accelerant of this multipolar change: it is an expression of diminishing faith in U.S. security guarantees, but also a form of new bilateral and minilateral security arrangements that further undermine U.S. centrality in the security affairs of the region.

Special attention of scholars is necessary in the nuclear aspect of the deal. The only Muslim majority state to have nuclear weapons, Pakistan is a country that is long been subject to speculation about the possibility of extending a Pakistani nuclear umbrella to Saudi Arabia, whether as formal deterrence assurances, transfer of technology, or as part of joint development arrangements (Riedel, 2023). Nuclear cooperation is not explicitly mentioned in the 2025 arrangement, yet its vagueness on this aspect, may be broadly seen by regional observers as deliberate, to play deterrence signaling purposes without the formal non-proliferation price of a formal declaration of nuclear partnership (Haider & Javid, 2024). This aspect of nuclear ambiguity substantially increases the strategic importance of the agreement that what it says on paper would indicate. The paper at hand provides a qualitative, interpretively based analysis of the implications of the Saudi-Pakistan Strategic Mutual Defence Agreement to regional security and the multipolar

world order that is on the rise. The study, under the guidance of an exploratory research design and informed by the insights of 18 well-chosen elite informants, aims to deliver a multi-perspectival explanation of the meaning of the agreement, how it has been received by the regional stakeholders and how it is likely to impact the emerging architecture of international security governance.

This article continues in the following way. Section 2 examines the academic body of pertinent literature on the Saudi-Pakistan relations, Gulf security architecture, deterrence theory and emerging multipolarity. The methodological approach is described in section 3. Section 4 gives thematic results of expert interviews and documentary analysis. Section 5 is a discussion of findings in reference to theoretical and policy frameworks. The article ends with recommendations to the policymakers who may want to manoeuvre through the convoluted implications of this historic agreement.

The importance of this agreement to the scholarly community goes beyond the fact that its bilateral consequences at the time it was signed are significant, but also because of the consequences of this agreement on international standards on the extension of nuclear deterrence, and the regulation of regional security arrangements in the context of an environment after U.S. hegemony, and great power competition in geographically disputed corridors. The



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nexus of Gulf petrodollar politics, South Asian nuclear politics, the Chinese strategic investment in the China-Pakistan Economic Corridor (CPEC), and the dynamics of the U.S.-India strategic partnership makes it a multi-layered analytical puzzle of specific modern importance.

## 2 Literature Review

### 2.1 Saudi-Pakistan Relations:

#### Architecture and Strategy Foundations

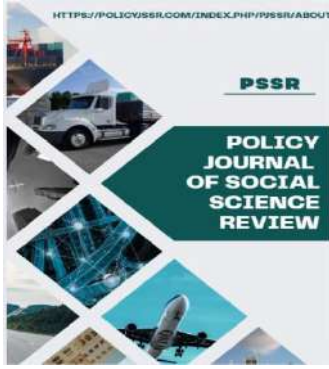
A unique blend of religious solidarity, economic interdependence, and security cooperation has traditionally typified the Saudi-Pakistan bilateral relationship, and distinguished it among most bilateral relationships in the Muslim world (Wynbrandt, 2010). Saudi aid to Pakistan in the successive economic crises such as the 1998 nuclear tests sanctions era, the global financial crisis of 2008, and several IMF program negotiation periods has made Riyadh a vital economic patron whose goodwill has an unprecedented strategic importance to Islamabad. The Pakistani military has served in Saudi Arabia since the 1960s and the Pakistani military has traditionally given training, advisory and security assistance to the Saudi armed forces and national guard.

Haider and Javaid (2024) follow the development of Saudi-Pakistan security cooperation in four phases: the Cold War phase of mutual anti-communist orientation; the phase of the Afghan jihad of mutual proxy warfare; the post-9/11 phase of cooperation in the war against terrorism complicated by the tensions of Pakistani state-tolerance of

extremist networks; and the modern stage of formalized strategic cooperation. The 2025 agreement is the logical next step in this evolutionary process, which converts decades of informal security cooperation into formal commitments.

Economic underpinnings of the relationship are of specific interest when it comes to realizing the strategic calculus behind the 2025 agreement. In Saudi Arabia, the most significant Pakistani diaspora community is in Pakistan, and the number of Pakistani workers remitting a range of 6-7 billion of dollars annually is a significant source of foreign exchange to the Pakistani economy which is facing a persistent balance of payments crisis (State Bank of Pakistan, 2024). The economic transformation agenda of Vision 2030 in Saudi Arabia has increased investment interest in Pakistan infrastructural, agricultural, and energy sectors with NEOM-related projects and the overall Saudi sovereign wealth fund involvement resulting in new economic interdependency relationships that not only drive but also support the security agreement.

Riedel (2023) offers an in-depth analysis of the nuclear aspect of the Saudi-Pakistan relations, where the development of nuclear arms capacity by Saudi Arabia, whether through direct Pakistani sale or co-development, or independent acquisition, is one of the most significant potential proliferation threats in modern international security. The author follows the historical development of the Saudi nuclear



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interest since the early 1970s up to the modern-day, recording Saudi investment in the Pakistani nuclear programs in the 1970s and 1980s and the continued ambiguity of the existence and nature of nuclear-for-oil deals between the two governments. In the analysis by Riedel, the 2025 agreement is a critical intensification of the implicit nuclear partnership, without any formal provisions.

## 2.2 Gulf Security Architecture and the Changing U.S. Role

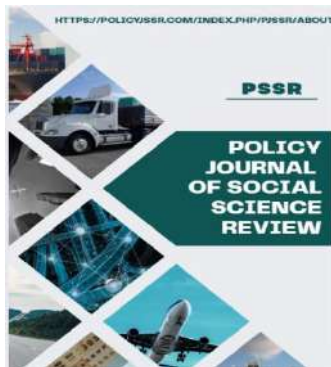
Since the 1991 Gulf War, the Gulf security architecture has been significantly transformed with the paradigm of U.S. military guarantees being the new paradigm of security structure of states in the GCC. In his book, Gause (2014) gives a detailed description of the U.S.-Gulf security compact, which documents how the institutions of military presence, arms transfer relations, intelligence sharing structures, and informal political agreement form the basis of what he refers to as the Gulf security bargain, which is the United States guiding security assurances in exchange to the oil market stability, dollar recycling, and the political consensus to U.S.

A set of developments in the last 10 years has been a major challenge to the durability of this security compact. The perceived lack of unwavering support of the Mubarak regime by the Obama administration during the 2011 Egyptian revolution, JCPOA talks with Iran that GCC states viewed as a strategic shift out

of its security concerns, U.S. energy independence without relying on shale oil that diminished the strategic need of access to Gulf oil, and the transactional security posture of the Trump administration that required Gulf partners to contribute more to The conditioned re-engagement of the Biden administration with Riyadh such as the original freeze of the arms sale and human rights-oriented framing of the bilateral relationship further created concern in Saudi on the unconditional sustainability of U.S. security assurances.

These dynamics have motivated GCC states, and Saudi Arabia, in particular, to seek security diversification policies that both entail the development of local defence industrial capacity through Vision 2030 programmes, and the development of alternative security relations with non-Western powers. The Chinese and Russian weapon procurement, the further development of security discussions with Turkey, and the establishment of the Saudi-Pakistan defence pact all make up aspects of this diversification plan (Al-Rasheed, 2024). The aggregate impact of such diversification initiatives is a gradual restructuring of Gulf security architecture not around a U.S.-centric hub-and-spoke framework, but around more pluralistic, multipolar model of overlapping and even competing security relationships.

The gulf cooperation council, as a collective security institution, has always failed miserably compared to aspirations by its architects. GCC failure to organize



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a consistent collective response towards either the Iraqi invasion of Kuwait in 1990 or the Arab Spring uprisings in 2011, its internal incoherence in the form of the Qatar-related 2017-2021 blockade, and the ongoing tension between the Saudi and Emirati strategic interests have restricted the utility of this collective security mechanism (Gause, 2014). Institutional constraints of the GCC as a collective security mechanism can be partially explained by the bilateralization of Saudi security relationships, such as the Saudi-Pakistan 2025 agreement.

udy is intended to shed light on these interrelated dimensions by conducting a systematic qualitative study.

### 2.3 Deterrence Theory, and Extended Nuclear Umbrellas

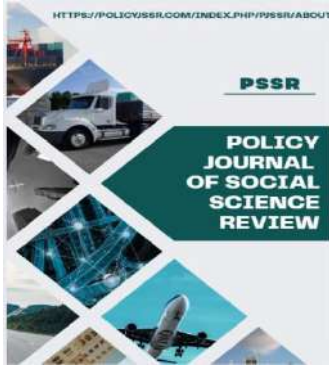
According to classical theory of deterrence, as theorized by Schelling (1966), Brodie (1946) and their followers, there is a distinction between deterrence by denial, i.e. the ability to deny an adversary the ability to meet his or her military goals, and deterrence by punishment, i.e. the ability to cause costs to an adversary in a manner that will exceed the perceived potential benefits. Extended deterrence, in particular, involves use of deterrent ability of one state to defend against assault on a third party, usually an ally.

The U.S. nuclear umbrella over NATO members and other key Asian allies such as Japan and South Korea is the canonical model that guarantees security with implicit threat of nuclear retaliation

in case of attacks on allied nations under the protection.

There are a few theoretically unique aspects to the application of the extended nuclear deterrence to the Saudi-Pakistan context. Contrary to the U.S. extended deterrence arrangements, which are premised on the obvious description of formal assurances and an extensive institutional framework of alliance administration, the nuclear aspect of the Saudi-Pakistan relationship entails deliberate ambiguity overtures instead of open commitment (Riedel, 2023). This ambiguity fulfills various purposes: it keeps Pakistani flexibility in non-proliferation promises, it avoids the legal complexities of explicit nuclear transfer schemes, it keeps the geopolitical blowback of Western alignment down to a minimum, and it also creates uncertainty in the minds of potential adversaries as to the exact nature of Pakistani-Saudi nuclear coordination.

Kristensen and Korda (2024) report on the situation with Pakistani nuclear forces and delivery systems, stating that the second-strike capability of Pakistan had improved in quality significantly, with the creation of submarine-launched cruise missiles, road-mobile ballistic missiles, and miniaturized tactical nuclear warheads. These capability improvements increase the possible range of deterrence coverage that Pakistan would potentially share with a partner, but the logistical, command, and operational burdens of real-life implementation of extended deterrence



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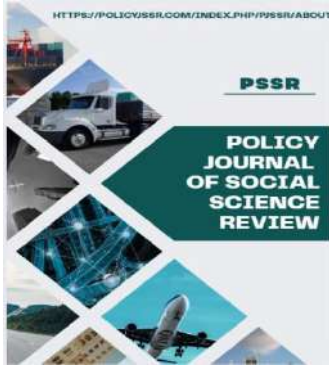
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are daunting. The authors observe that Pakistani nuclear doctrine has been progressively focusing on full-spectrum deterrence - including conventional, strategic, and tactical nuclear components - in a manner that renders the extension of umbrella-type assurances unproblematic. The Israeli nuclear ambiguity stance and the development of nuclear program in Iran further complicate regional deterrence dynamics in the Gulf. Mearsheimer (2019) presents an offensive realist stance that the rationality of security competition in a multipolar nuclear setting generates strong incentives to nuclear proliferation by non-nuclear states who see a threat to existential survival by nuclear-armed rivals. In this analytical perspective, the Saudi-Pakistan deal can be described as a functional nuclear balancing policy to both Iranian nuclear development and Israeli nuclear monopoly in the region, even without the direct formal nuclear avenues.

This shift of the international system to multipolar has spawned a scholarly debate about its effects on the governance of regional security, politics of alliances, and the governance of great power competition. According to Ikenberry (2018), a liberal institutionalist viewpoint can be provided, suggesting that the current rules-based order in the international system is rather resilient and that the shift to multipolarity, though disruptive, does not necessarily have to be traumatic, provided that it is addressed through institutional change

and collaborative interaction. By contrast, Mearsheimer (2019) posits that historically multipolarity is more destabilizing than bipolarity because the greater number of great power dyads, the more possible conflict pairings exist and the lower is the disciplining influence of articulate balancing coalitions.

The Gulf-South Asia corridor holds a very tricky ground in the new multipolar world. The establishment of major economic interdependencies by Chinese strategic investment in the form of CPEC has complicated the ability of Pakistan to operate independently strategically, but has also given Beijing the possible foothold in the wider Gulf strategic environment (Khan, 2023). The Russian involvement in Iran and Saudi Arabia, such as selling arms to the former and coordination of energy within the OPEC+ system with the latter, further complicates the great power geometry of the region. The Saudi-Pakistan agreement is therefore stipulated in a multi-layered framework of overlapping great power rivalry where U.S., Chinese, and Russian interests overlap and even contradict one another in complex and even conflicting contexts. Nasr (2022) suggests that the strategic hedging of the Gulf states, which involved keeping connections to several great powers without engaging in exclusive relationships with any of them, is a complex adaptation to multipolar reality and not a demonstration of naive non-understanding of the commitments of the alliances. This position of strategic hedging, as discussed by Nasr, represents



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an unblinded evaluation by Gulf leaders that the days of unconditional U.S. security guarantees are over and that regional security will have to be increasingly self-insured through diversified alliances. The Saudi-Pakistan agreement will be a nice addition to this portfolio of strategic hedging as it will give Saudi Arabia a South Asian element of security in its diversified portfolio of partnerships with its ongoing United States, China, and European relationships.

Al-Rasheed (2024) analyzes the domestic politics of Saudi security policy by asserting that Vision 2030 and the transformation of Saudi government under MBS have introduced novel domestic politics impacting foreign and security policy in significant manners. The Saudi national identity focus, a decline in the role of the religious establishment, and the posture of assertive regional leadership all suggest that the political project of MBS is more activist and diversified in its approach to Saudi security that is not as deferential to U.S. preferences as its predecessors. The Pakistan agreement, in this local political situation, is a sign of Saudi strategic autonomy and regional dominance ability.

### 3. Methodology

#### 3.1 The research design and paradigm

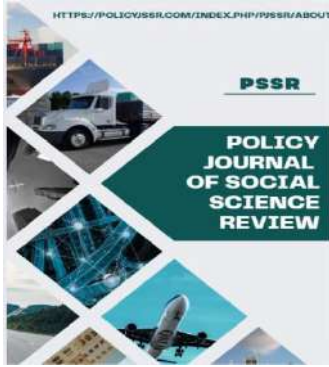
This research took a qualitative, exploratory research design that was placed on an interpretivist epistemological approach. The interpretivist paradigm, as expounded by Denzin and Lincoln (2018), assigns

importance to the comprehension of social phenomena in terms of the meanings that participants in a particular political, institutional, and cultural setting assign to them. These security agreements, alliances politics and deterrence relationships are all phenomena that are inherently intersubjective in nature; their meaning is not based solely on material competence or structure but on how they are perceived, cued and responded to by interested parties. The qualitative interpretivist inquiry is thus especially suitable to the investigation of the implications of the Saudi-Pakistan agreement to the regional security and multi-polarity.

The exploratory design was selected due to the novelty of the 2025 agreement as the phenomenon of interest. The agreement is a new strategic structure that has not yet amassed the longitudinal track record that would make it possible to conduct systematic large-N quantitative analysis. In comparison, exploratory qualitative inquiry is specifically aimed at studying novel or under-studied phenomena in which the production of rich descriptive and analytical understanding takes precedence over statistical generalization (Creswell and Poth, 2018).

#### 3.2 Sampling Strategy and Participant Profile

To achieve the substantively rich data on the research questions raised by the study, a mix of purposive and elite sampling was adopted to recruit participants who hold



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the special expertise and institutional vantage points that would be able to deliver the information required. According to Patton (2015), purposive sampling is a method that guides the researcher in choosing participants based on their knowledge, experience, or institutional perspectives that are applicable to the phenomenon being studied. Elite sampling as described by Stephens (2007), is explicitly aimed at persons holding high institutional posts - such as senior officials, retired ambassadors, and high-ranking academic specialists - who can offer special analytical value due to their access to privileged information and decision-making contexts. The ultimate sample involved 18 respondents in five occupational groups. They consisted of

defense analysts of leading security research organizations in Pakistan, Saudi Arabia, the United Kingdom and the United States; foreign policy experts with first-hand experience of bilateral diplomatic relations between the two countries; military scholars of defense academies and university security studies programs; retired diplomats who served as ambassadors or senior diplomatic staff in related bilateral posts; and academic scholars specializing in international relations, security studies, and regional politics. The participants were geographically distributed, covering South Asia, the Gulf region, Europe, and North America so that the implications of the agreement are multi-perspectively covered.

## Table 3

### *Participant Profile Summary*

Category	Number	Affiliation Type	Avg. Experience (Years)
Defense Analysts	4	Think Tanks, Defense Research	18
Foreign Policy Experts	4	Foreign Ministries, MFAs	16
Military Scholars	3	Defense Academies, Universities	22
Diplomats	4	Retired Ambassadors, Attaches	20
Academic Scholars (IR/Security)	3	Universities (South Asia, Gulf, UK)	14
Total	18	Diverse International	18 (average)

**Note.** Participant numbers and affiliations are presented in aggregate to preserve anonymity. Geographic distribution covered South Asia (n = 7), Gulf region (n = 5), Europe and North America (n = 6).



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**Data collection and data analysis will be carried out by using the methods presented below:**

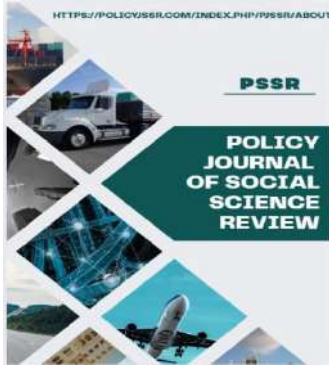
The semi-structured, in-depth interviews between February and May 2025 were used to gather primary data. Since the participants are widely spread geographically, and the topic of the interview is sensitive, the interview was conducted through encrypted videoconferencing platforms with proper security measures. The interviews took between 60 and 95 minutes with the mean being 74 minutes. A six-domain interview guide was created: (1) strategic rationale and motivations behind the agreement, (2) implications of the agreement on regional security and threat perception dynamics and (3) nuclear dimension and deterrence implications, (4) great power responses and multipolar dynamics, (5) economic-security linkages, and (6) long-term implication of the agreement on regional security governance. The semi-structured design allowed both systematic coverage of the themes and space to allow participants to expound on aspects of specific analytical interest, as per their own expert vantage points.

The secondary data were collected by systematic examination of documents, i.e. the official joint communiqué stating the agreement, policy papers provided by International Institute of Strategic Studies, the Royal United Services Institute, Stimson Center, the Islamabad Policy Research Institute and the King Faisal Center of Research and Islamic

Studies. The documentary corpus was also represented by academic journal articles, newspaper reports of reputable regional sources such as Dawn, Arab News, and the Jerusalem Post, and think tank publications of Brookings, RAND, and Carnegie Endowment of International Peace.

Thematic analysis process of Braun and Clarke (2006), comprising of six phases, was used to analyze the data. The preliminary open coding of interviews transcripts was done by NVivo qualitative data analysis software and the codes were then sorted into thematic groups through the development and refinement of themes in an iterative process. Twelve out of 18 respondents were subjected to member checking, where they read and verified summary reports of their work. Two academic colleagues experienced in Gulf security studies and South Asian international relations respectively were peer debriefed. To guarantee confirmability, clear documentation of the analytical procedure was observed during the process.

Data collection was done with ethical approval. Informed written consent was obtained, and explicit instructions on anonymity by coding were given. The information was kept in encrypted servers and only accessible to the research team. A number of the participants asked their institutional affiliations to remain undisclosed in the published products; this was met by using generic descriptors of professional categories used throughout the analysis and report.



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Table 1

## *Key Provisions of the Saudi–Pakistan Strategic Mutual Defence Agreement (2025)*

Provision Area	Key Components	Strategic Significance
Defence Cooperation	Joint military exercises; intelligence sharing; interoperability protocols	Deepens institutional military-to-military linkages beyond bilateral diplomatic assurances
Mutual Defence Obligations	Conditional mutual assistance in cases of external aggression	Creates ambiguity regarding deterrence extension to nuclear dimension
Economic-Security Linkages	CPEC connectivity; energy investment; labour remittance frameworks	Embeds security ties within broader economic interdependency architecture
Counter-Terrorism	Intelligence fusion; designation coordination; financial network disruption	Addresses shared threat perceptions from non-state actors in Afghanistan-Pakistan theatre
Maritime Security	Arabian Sea patrol coordination; naval port access provisions	Enhances Pakistan Navy's operational reach in strategic Gulf waters

Note. Provisions summarized from official joint communiqué, supporting policy documents, and expert participant descriptions. Specific treaty language remains partially classified; descriptions represent expert consensus characterizations.

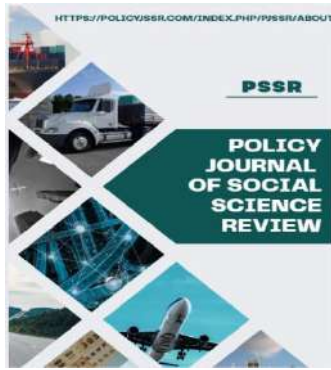
## 4. Results and Discussions

### 4.1 Theme 1: Strategic Alignment, Nuclear Deterrence and the Nuclear Dimension

The most analytically charged aspect of the Saudi-Pakistan agreement consistently noted in participant accounts was the implications of deterrence, especially the ambiguous nuclear aspect of it. That aspect caught the attention of defence analysts and military scholars participants especially since the formal text of the agreement does not include any express nuclear language, and at the same time,

includes language on the mutual security cooperation that is broad enough to encompass an interpretation of mutual security cooperation that includes nuclear deterrence.

The respondents with military and security analysis backgrounds displayed a sophisticated understanding of how deliberate nuclear ambiguity operates as a strategic tool within the Gulf security context. This deal leaves the terms of the Pakistani nuclear promises to Saudi Arabia vague, allowing this to achieve the highest possible deterrence signalling value against other countries, especially Iran, and the least possible formal non-proliferation payments that explicit language on nuclear transfer would result in. Many respondents observed that this was similar to the long-standing nuclear ambiguity position of Israel which has



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had the same effect of maximising deterrence value and avoiding the international pressure that would be created by official nuclear declaration. The logic of deterrence extension of the agreement was described in several perceptions of adversaries working in parallel. Iranian military strategists cannot afford to overlook the possibility that an attack on Saudi Arabia might result in Pakistani military intervention, possibly including the nuclear aspect being activated, turning what might have been estimated as a regional war into an existential war with a nuclear-powered nation. The improved capabilities of counter-terrorism coordination of cross-border actors in the Saudi-Pakistan security environment have reduced the operational space of the cross-border militant networks. Participants viewed these multi-directional deterrence effects as intentional, complementary design features of the solution rather than side-effects. Several of the diplomat and foreign policy analyst participants raised important qualifications on the reliability of the deterrence promises of the agreement. They noted that Pakistan has a history of balancing conflicting bilateral relations such as its multi-polar relationship with Saudi Arabia, Iran and China which puts real uncertainty to the situation in which Pakistan would be meeting its most significant security commitments. The limits to the unconditional operationalisation of mutual defence commitments in extreme situations are Pakistan's economic

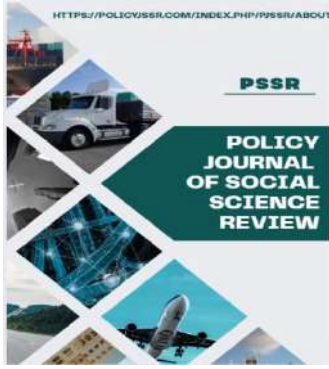
vulnerability to possible US economic pressure, the country's need to maintain its relationship with IMF programmes and the country's interest in continuing to have working relations with Iran as a neighbouring state.

## 4.2 Theme 2: Regional Security Dynamics and Threat Perceptions

The security implications of the agreement in the region were discussed in terms of the threat perceptions and strategic responses that the agreement creates among the key actors in the region. The participants have offered various assessments of how the agreement is perceived and processed by Iran, India, Turkey, Israel and other major stakeholders in the region.

The most acute and immediate implication of security in the region was declared as the threat perceptions of Iran. Institutionalising the Saudi-Pakistan defence relationship would be seen by Iranian strategic planners as the introduction of a major worsening of the security situation in the region by introducing a nuclear-armed actor to the South Asian theatre, defence analyst respondents said.

The final sample consisted of 18 respondents in five occupational groups. The participants comprised defence analysts from leading security research organisations in Pakistan, Saudi Arabia, the United Kingdom and the United States; foreign policy experts with first-hand experience of bilateral diplomatic relations between the two countries; military scholars from defence academies



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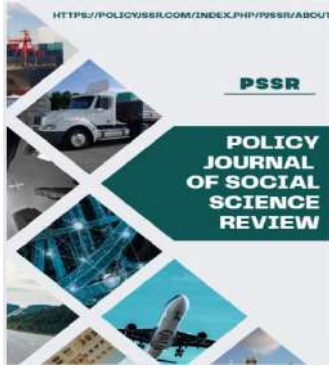
and university security studies programmes; retired diplomats who had served as ambassadors or senior diplomatic staff in relevant bilateral posts; and academic scholars specialising in international relations, security studies and regional politics. The participants were spread out geographically, covering South Asia, the Gulf region, Europe and North America so that the implications of the agreement are covered from several perspectives. constellation of states opposed to Iranian regional interests with the U.S., Israel and the GCC. Several participants have pointed out that this view of strategic encirclements has historically tended to speed up, not slow down, the Iranian nuclear program, possibly creating a counterproductive relationship where the logic of deterrence inherent in the agreement is producing the very threat it is designed to deter. The strategic issues were of great interest to the Indian reaction to the South Asia-

Table 2

## *Comparative Regional Security Implications by Actor*

Regional Actor	Perceived Impact	Strategic Response	Multipolarity Implication
Iran	Elevated threat; encirclement concerns	Enhanced deterrence posture; diplomatic outreach	Deepens Sunni-Shia strategic fault line
India	Heightened concern over Pakistan-Gulf security axis	Strengthening UAE, Israel ties; diversification	Complicates India's multipolar positioning
China	Cautious acceptance; monitors nuclear dimension	Reinforces CPEC security guarantees	Strengthens BRI-aligned security architecture
United States	Mixed; values Saudi stability, concerned by	Renewed Pakistan engagement; security	Complicates US-India strategic partnership

oriented actors. The deal makes the already tricky relationship that India has with Pakistan even more complicated with a Gulf financial and security patron thrown in to add to the strategic depth and economical robustness of Pakistan. Some of the participants noted that the agreement has already sparked quiet discussions in the Indian strategic planning communities of what the agreement would mean to the Indian Ocean security dynamics, especially with maritime security provisions of the agreement that augment the Pakistani naval operational capability in the Arabian Sea – through which much of the Indian trade passes. What the participants see is India trying to counter the Saudi-Pakistan axis by diversifying its own partnerships in the Gulf by strengthening security and economic ties with the UAE and other Gulf countries as a counter-balance.



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Turkey	nuclear ambiguity Views as complementary to its own Islamic-world positioning	assurances Enhanced (Turkey-Pakistan- Saudi) dialogues	calculations trilateral Consolidates alternative Muslim- majority security axis
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Note. Actor assessments derived from expert participant analysis and corroborated through policy document analysis. Characterizations represent analytical summaries rather than official positions of listed governments

Players said the Turkish response to the accord was largely positive and a pointer to the aspirations of Ankara to be given more leadership in the Muslim dominated world. Several participants suggested that the Saudi-Pakistan agreement could create space for trilateral security cooperation among Turkey, Saudi Arabia and Pakistan – three relatively powerful Muslim-majority states with combined military power and strategic positioning, which could make for a formidable non-Western security axis. However, some participants saw this prospective trilateral dynamic as potentially having implications on the architecture of global Islamic geopolitics, while others warned that the high level of bilateral tensions between Turkey and Saudi Arabia would make trilateral coordination difficult.

### 4.3 Theme 3: Great Power Politics and Multipolarity

The third thematic area was the implication of the Saudi-Pakistan agreement to the broader transition to a multi-polar international system. Interviewees consistently framed the agreement as a consequence and a factor

of the structural decline of U.S.-centric security arrangements in the Gulf-South Asia corridor, while also producing complex second-order processes between China and the U.S. and Russia in the great power competition.

Those with diplomatic and foreign policy experience have characterised the American response to the pact as one of measured alarmedness – acceptance of the rationale behind Saudi security diversification initiatives and private scepticism about the nuclear ambiguity component, and its effect on regional non-proliferation principles. Some respondents acknowledged that the United States has high leverage over Saudi Arabia and Pakistan, but it is waning as Saudi Arabia becomes more economically diversified and less dependent on U.S. military-technological patronage and Pakistan becomes more China-oriented and less dependent on U.S. development aid and IMF-style financial aid. This erosion of leverage complicates U.S. efforts to shape the implementation of the agreement in a way that would be consistent with U.S. nonproliferation objectives.

Participants judged the Chinese reception of the agreement to be finely tuned. On one hand, beefing up Saudi-Pakistani security relations is in line with Chinese interests in beefing up CPEC's security architecture, and the broader



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dismantling of U.S.-led security structures in the region. But China has a complex relationship with Iran too, exemplified by significant energy import dependencies and a 25-year comprehensive partnership agreement signed in 2021 which provide incentives to temper the extent to which the Saudi-Pakistan agreement directly threatens Iranian security interests. Participants describe China's approach as strategic acquiescence and quiet diplomacy to make sure the agreement will not upset the larger Gulf security environment in ways that might imperil Chinese commercial interests.

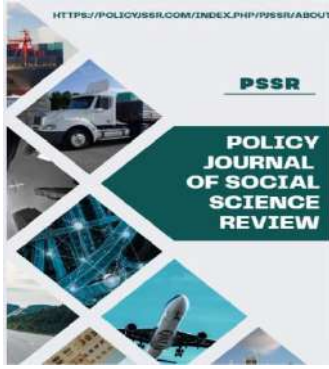
The role of the agreement in the emergence of multipolarity was measured in terms of the concept of pluralisation of security governance, i.e. the enhancement of bilateral and minilateral security arrangements, which however decrease the centrality of U.S.-based alliance structures without substituting them with any alternative single security architecture. This dynamic of pluralisation of governance is not lost on scholars interested in international relations theory, who have noted that it is consistent with transitions in the past between hegemonic and multipolar international orders, where middle powers are increasingly acquiring greater strategic autonomy and building alternative security structures that insulate them against being dependent on any one great power patron.

The fourth group of themes dealt with the economic dimension of the agreement and its connection with the

security provisions. The 2025 agreement cannot be seen only through the security lens, respondents stressed repeatedly, but needs to be contextualised in a larger frame of economic dependencies that not only drive the security relationship but also underpin it.

The strategic calculus of the agreement is predicated on Pakistan's economic vulnerability as a critical background condition. As of 2025, Pakistan has been through numerous IMF schemes, acute pressure on foreign exchange reserves and large foreign debt service requirements that have necessitated repeated injections of Gulf financial support including a 3 billion Saudi deposit at the State Bank of Pakistan in 2023 as well as other bilateral financing schemes that have provided vital liquidity relief at times of IMF program uncertainty (State Bank of Pakistan, 2024). This economic dependency structure provides strong incentives for Pakistan to align strategically with Saudi wishes and limits the diplomatic options of Islamabad for balancing manoeuvres that could put Saudi goodwill at risk.

The actors largely challenged CPEC and its association with Saudi-Pakistan security pact. Some have observed that the Saudi interest in Pakistan in terms of investment in Pakistan through oil refinery capacity, agricultural processing and tourist infrastructure creates economic synergies with the connectivity framework that is being actively pursued by CPEC. The security agreement also acts as a political enabler for further



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economic integration in this respect as it provides the institutional guarantee framework for the large-scale Saudi

investment in Pakistan to be more commercially viable.

## Table 4

### *Thematic Findings Matrix: Saudi–Pakistan Agreement Implications*

Theme	Sub-Themes	Core Finding
Strategic Alignment	Deterrence extension; nuclear ambiguity	The agreement deepens strategic deterrence linkages between Saudi Arabia and Pakistan, with implicit – if deliberately ambiguous – nuclear dimension serving as an asymmetric deterrent against regional adversaries.
Regional Security Dynamics	Iran threat perceptions; Indian responses; Gulf stability	Regional actors interpret the agreement as a recalibration of Gulf security architecture, generating both destabilizing threat perceptions among adversaries and stabilizing deterrence signals for Saudi Arabia.
Emerging Multipolarity	China's role; U.S. positioning; alternative security axes	The agreement reflects and reinforces the trend toward multipolar security governance in the Gulf-South Asia corridor, reducing U.S. centrality and creating new bilateral and unilateral security arrangements.
Economic-Security Nexus	CPEC; remittances; energy investment	Security and economic interdependencies are mutually reinforcing, with CPEC investments, energy partnerships, and labor remittance flows providing structural economic foundations for the security relationship.

Note. Thematic findings derived from systematic thematic analysis of semi-structured expert interviews (n = 18) and corroborated through qualitative document analysis. All attributions are representative of expert consensus positions rather than individual participant views.

Participants repeatedly identified the remittance dimension of the economic-security nexus as an underappreciated but vital structural pillar of the bilateral relationship. The roughly 2.5 million

Pakistani workers in Saudi Arabia provide not only important flows of foreign exchange, but also a form of human-capital interdependence that creates mutual interests in bilateral political stability. The sporadic employment of labour policy as an instrument of Saudi Arabia's diplomacy – for instance, managing the workforce in light of diplomatic strife – has long piqued the interest of Pakistani policymakers in cultivating Saudi goodwill. On this reading, the



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formalisation of the defence agreement can be understood in part as Pakistan's institutional response to the need to secure its labour market access through deepened strategic commitments that make diplomatic disruption prohibitively costly for both parties.

## 5. Discussion of Results

The results of this paper shed light on the Saudi-Pakistan Strategic Mutual Defence Agreement as a multi-dimensional strategic instrument, which has the deterrence, economic, domestic political and structural geopolitical roles that go far beyond the bilateral dyad. The significance of this agreement is not so much in its formal terms – which are intentionally vague on most critical points – as in the signal it sends to regional actors, great powers and international institutions about the emerging architecture of Gulf and South Asian security governance.

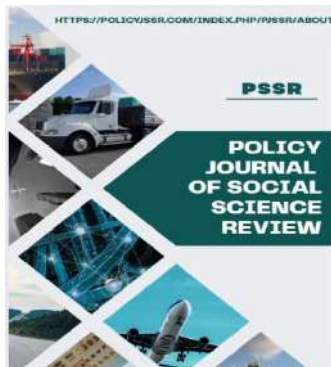
The results have important theoretical implications. From the perspective of deterrence theory, the Saudi-Pakistan agreement is an interesting case study of deterrence extension by deliberately creating ambiguity, a strategy that will maximise the value of signalling and minimise the cost of formal commitment. This approach stands in contrast to classical models of extended deterrence which depend on clear, credible commitments. It may be better to consider this as deterrence suggestion rather than deterrence extension in the classical sense. The question of whether strategic ambiguity provides the same

level of deterrence value as the formal commitment is an empirically contestable question the answer to which depends on the perceptions of adversary risk and the decision-making process under uncertainty.

The implications of multipolarity for the findings support characterising Gulf state strategic hedging as a complex adaptation to structural changes in international order rather than a naive rejection of the value of US alliances. The Saudi-Pakistan agreement is not Saudi Arabia's exit from the U.S. security system but its conscious production of alternative security relations which minimise unipolar dependence and the strategic bargaining power – even with the United States itself. Were other regional middle powers to emulate this hedging logic successfully, it would contribute to a cumulative pluralisation of security governance that structuralises multipolarity beyond what any one bilateral agreement could achieve in isolation.

## 6. Summary and Recommendations

In this paper, we have presented a complete qualitative analysis of the impact of the Saudi-Pakistan Strategic Mutual Defence Agreement (2025) on regional security and rising multipolarity. The study, drawing on the insights of 18 elite informants and systematic documentary analysis, has demonstrated that the agreement is a multidimensional strategic instrument with important implications for the dynamics of deterrence, regional threat perception, the perception of great power



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competition management of the agreement, and the structural evolution of international security governance.

The analysis results in four policy recommendations. First, the United States and its allies in the West need to engage Saudi Arabia and Pakistan in well-organised discussions on the nuclear ambiguity aspects of the agreement and seek formal guarantees on non-proliferation compliance, rather than allowing strategic ambiguity to serve as an uncontrolled threat of proliferation in the regional context. Second, more robust monitoring and engagement models are needed of military cooperation agreements that may have nuclear implications in volatile regional contexts by international organisations, particularly the International Atomic Energy Agency and the UN Security Council. Third, India needs to look for proactive diplomatic initiatives with both Saudi Arabia and Pakistan to ensure that the bilateral arrangement does not ossify into an adversarial security axis, and must also diversify its partnership with the Gulf counterparts to reduce its vulnerability to Saudi-Pakistani security alignment. Fourth, multilateral diplomatic forums such as the Organization of Islamic Cooperation and the Shanghai Cooperation Organization should be used as potential platforms for constructing broader multilateral frameworks within which the Saudi-Pakistan relationship can be situated in a cooperative regional security architecture,

rather than it becoming a competitive regional security bloc.

There are some limitations to this study that are acknowledged. The qualitative design is analytical but lacks the statistical ability to generalise. The elite sampling strategy will ensure substantive analytical richness, but will also over-represent institutionally well-positioned actors and under-represent civil society, academic dissenters and non-elite voices in the affected countries. Given the dynamism of the geopolitical events taking place in the Gulf, a review of findings as events unfold is necessary. Further investigations should merge qualitative information with quantitative conflict risk models and game-theoretic formal analysis to build more comprehensive predictive frameworks for the long-term security implications of the agreement.

The Saudi-Pakistan Strategic Mutual Defence Agreement is a historic development that has implications not only for bilateral relations but also for fundamental questions of how security governance is organised in a multipolar world, how nuclear deterrence dynamics operate in a situation of multiple competing nuclear and aspiring-nuclear actors, and how economic interdependencies affect the structural possibilities of security arrangements. And these are the questions demanding long-term academic focus and policy engagement over the coming years and decades.



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