Different Foundations, Shared Arena: India, Pakistan and the Political Economy of Gulf Partnerships

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Abstract

This article asks under what conditions India and Pakistan convert their partnerships with the Gulf into credible cooperation, domestic capability and strategic autonomy. It compares the two states across the six members of the Gulf Cooperation Council, giving analytical weight to Saudi Arabia and the United Arab Emirates and drawing supporting evidence from Qatar, Bahrain, Kuwait and Oman. Each relationship is assessed through four dimensions applied to equivalent functions: commitment, capability, performance and protection. The evidence supports a two-model reading. India engages the Gulf through a complex of labour, market and society, anchored in occupational depth, comprehensive economic agreements, energy and payments integration, and a demonstrated capacity to protect people during conflict. Pakistan engages through a complex of rent and security, anchored in manpower export, religious framing and recurrent external financing. The study advances the proposition that partnerships acquire durable value when external resources finance productive capacity and institutional continuity, whereas geopolitical relevance converted into rent can postpone the reform on which autonomy depends. The regional crises and security realignments of 2025 and 2026, including the strike on a United States base in Qatar and the Mecca defence pact, provide the stress test for these relationships. The findings indicate that India offers greater value in economic delivery, institutional continuity and citizen protection, though Gulf governments weight these capabilities by their own priorities, combining deeper economic engagement with India and selective security cooperation with Pakistan to advance national transformation and strategic autonomy.

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ISSN: 3108-0405 (O)

Keywords: *India-Gulf relations; Pakistan-Gulf relations; strategic autonomy; political economy; migration and remittances; human security.*

The Question of Dependable Partnership

On 7 May 2025, during an academic seminar in Tehran, a Pakistani participant relayed news of fighting between India and Pakistan. What stayed with me was that two neighbours have engaged the same Gulf for generations, sending millions of people and drawing vital remittances, yet rest on foundations so different that a single crisis reveals the distance between them.

The perspective offered here rests on more than two decades of engagement with Gulf societies, migrant working life and the political economy of a region binding Asia, Africa and Europe. The purpose is analytical rather than celebratory. External engagement becomes strategic value only when access becomes delivery, and delivery becomes protection. A partnership rich in ceremony but thin in capability expands the appearance of choice while leaving its substance untouched.

The article therefore pursues a single organising question. Under what conditions do India and Pakistan convert their Gulf partnerships into credible cooperation, domestic capability and strategic autonomy (Kumaraswamy, Hameed, & Quamar, 2026)? It answers through a disciplined comparison, anchored in Saudi Arabia and the United Arab Emirates, extended across the full membership of the Gulf Cooperation Council, and tested against the regional conflict of 2025 and 2026.

The claim advanced here is deliberately conditional. It does not assert that India outperforms Pakistan across every function, since Pakistan retains genuine labour ties, a real security relationship with Riyadh and a diaspora that sends home indispensable remittances. It identifies instead where India provides greater value, through which mechanisms, and under what conditions, and it treats the answer as a proposition tested against evidence rather than a settled scoreboard. The West Asian setting sharpens the test, because a region defined by the Israel–Palestine conflict, the pressures surrounding Iran, the

reconstruction of Syria, the humanitarian emergency in Yemen and the political fragility of Lebanon and Iraq subjects every partnership to strain, and strain is the truest examination of a partnership's foundations (Kumaraswamy et al., 2026). The Gulf, sitting at the junction of these crises and of the trade and energy routes that carry the world's commerce, is where the two South Asian models are most fully revealed.

How Partnerships Produce Autonomy

Strategic autonomy describes the freedom of a state to choose its own course under pressure, and that freedom is real only when usable alternatives exist. The task of this section is to specify the mechanisms through which partnerships either widen genuine choice or decorate dependence, and to set out the method by which the two cases are judged.

The first mechanism concerns perception and identity. Gulf governments read India and Pakistan through their own national projects, and those readings shift as the projects evolve. Saudi Arabia under Vision 2030 and the United Arab Emirates as a diversified trading state now interpret partnership through the requirements of economic transformation, technological advancement and regime security (Baabood, 2024). The change is observable in conduct rather than rhetoric. It appears in the honour conferred, the statement withheld, the silence maintained over a contested question, and the itinerary chosen. When the Indian External Affairs Minister toured Doha, Manama, Kuwait City and Muscat between 5 and 10 July 2026, the sequence recorded India's own priorities and the access it commands, and read alongside the agreements signed and the honours conferred it forms part of a wider pattern of Gulf valuation rather than a proof standing on its own (Ministry of External Affairs [MEA], 2026a).

The second mechanism concerns institutions. Agreements, councils and settlement procedures reduce uncertainty and make cooperation repeatable, and commercial and societal density creates incentives for continuity that survive individual disputes (Keohane, 1984). A comprehensive economic partnership, a strategic partnership council, a minilateral such as I2U2, and the

ISSN: 3108-0405 (O)

coordination that makes an evacuation possible each lower the cost of the next transaction. Interdependence generates resilience where it is reciprocal and asymmetric vulnerability where it is concentrated.

The third mechanism concerns rent. Rentier scholarship distinguishes the hydrocarbon rent that accrues to the Gulf producer from the geopolitical rent, the external financing a state earns from its strategic location and its manpower that accrues to the state which rents them out (Beblawi & Luciani, 1987; Thiollet, 2024). The first funds a domestic distributional order. The second, this article argues, too often funds the deferral of reform. Soft power completes the framework, since attraction, cultural familiarity and legitimacy operate alongside market size and coercive capacity, and they must be distinguished from them, because the cultural fluency of a migrant community becomes politically consequential only when it is joined to demonstrable channels of trust, access and institutional recognition (Samaan, 2019).

The comparison proceeds through a structured, focused assessment of each relationship against four questions applied to equivalent functions. Commitment asks what a named instrument actually promises, in what form, and with what institutional standing. Capability asks what financial, productive, technological and administrative resources could fulfil that promise. Performance asks what was delivered, delayed or withheld during a defined episode, comparing economic delivery with economic delivery, defence cooperation with defence cooperation, and citizen protection with citizen protection. Protection asks what difference the relationship made to the safety of workers, the security of energy supplies and airspace, or the continuity of essential services. The analysis then explains why a given Gulf partner assigns different priorities to these functions. An unknown outcome is treated as distinct from a failed one: the absence of public information about defence cooperation establishes uncertainty rather than inactivity. The same standard applies to both states throughout.

Two propositions guide the analysis. The first holds that partnerships endure when external resources finance productive capacity and institutional continuity, and that relevance converted into rent postpones reform and

ISSN: 3108-0405 (O)

narrows autonomy. The second holds that diversified relationships strengthen autonomy when they create usable alternatives and build domestic capacity, while diversification accompanied by concentrated dependence or repeated fiscal vulnerability produces fewer practical options than its diplomatic appearance suggests. The evidence is permitted to identify the exceptions, the cases in which commercial ties yield limited security cooperation, in which diplomatic access fails to produce operational assistance, or in which another partner supplies a capability that India cannot. Sovereignty, national interest, status and security remain the central motivations of every actor in the account, and the Gulf States above all are treated as agents whose own priorities shape the terms on which any partnership proceeds.

The Domestic Foundations of External Engagement

Migrants under sponsorship, not a naturalised diaspora

A precise word is required at the outset. The Indian and Pakistani communities in the Gulf are migrant populations rather than a naturalised diaspora, because the Gulf States extend residence through employment and sponsorship and do not, as a general rule, offer citizenship (Fargues, 2011; AlShehabi, 2021). This single legal fact conditions everything that follows. Economic incorporation coexists with restricted political membership, and the relationship is renewed continuously through labour demand rather than settled through nationality.

The scale of the Indian presence is without regional parallel. Indian nationals number approximately 4.3 million in the United Arab Emirates, 2.65 million in Saudi Arabia, one million in Kuwait, 830,000 in Qatar, 665,000 in Oman and 350,000 in Bahrain, a combined presence of approximately 9.8 million people (Arab News, 2025). In the financial year 2023 to 2024 India received USD 118.7 billion in remittances, of which the six Gulf States supplied close to 38 per cent, the single largest regional source (Reserve Bank of India [RBI], 2025). The occupational spread runs from construction and domestic service through nursing, teaching and accountancy to engineering, medicine, finance and enterprise (Jain, 2025). This range creates high replacement costs in

ISSN: 3108-0405 (O)

specific sectors and embeds Indian labour in the daily functioning of Gulf economies in a way that aggregate figures understate.

Pakistan maintains a substantial presence of its own, and the comparison must rest on figures rather than adjectives. Some 11 million Pakistani nationals live abroad, the great majority in the Gulf, with roughly 2.64 million in Saudi Arabia alone (State Bank of Pakistan [SBP], 2026; Bureau of Emigration and Overseas Employment [BEOE], 2025). Pakistan received a record USD 41.6 billion in remittances in the financial year 2025 to 2026, of which Saudi Arabia supplied 9.78 billion and the United Arab Emirates 8.81 billion, so that the two states together account for close to half the national total (SBP, 2026). The occupational record shows both range and concentration, with the Bureau of Emigration registering large numbers of general labourers and drivers alongside smaller cohorts of engineers and doctors in 2024 (BEOE, 2025). The comparison is therefore one of composition rather than mere presence. India's occupational diversity spreads its exposure and multiplies the points of specialised dependence it creates, while Pakistan's heavier concentration in construction, transport and general labour leaves it more sensitive to sectoral downturns and to the nationalisation policies that Gulf States apply to protect citizen employment (Sahu, 2025). The South Asian ecosystem of workplaces, markets, schools, clinics, retail and community networks binds both economies to the Gulf at the level of daily life, and it differentiates sharply by class, gender, nationality and legal status, so that the position of a specialist physician differs profoundly from that of a construction worker bound by recruitment debt (Gardner, 2010).

Positive protection measures on both sides

Protection of migrants has improved through documented policy rather than sentiment. India operates the eMigrate system to regulate recruitment and reduce exploitation, maintains wage-protection understandings with several Gulf states, and sustains a consular apparatus scaled to a population approaching ten million (MEA, 2026a). Gulf governments have moved as well. Saudi Arabia's labour reforms have loosened elements of the sponsorship system, and the Gulf States operate wage-protection mechanisms that,

whatever their limits, mark a real advance on the earlier order (Naidu, Nyarko, & Wang, 2023). An honest account records these measures and assesses them by their scope rather than dismissing them.

The nationalisation policies that the Gulf States pursue, from Saudisation to Emiratisation, reshape the terrain for both South Asian workforces, reserving categories of employment for citizens and compressing the space available to migrants (Sahu, 2025). India's occupational diversity gives it a measure of insulation, since its nationals occupy specialised and professional roles that are harder to nationalise quickly, whereas a workforce concentrated in lower-skilled sectors is more directly exposed to displacement. This structural difference matters for the durability of each relationship, because a migrant presence embedded in the higher-value functions of an economy generates a form of interdependence that a presence concentrated in replaceable roles does not, and interdependence is the raw material of strategic value.

Historical and civilisational depth

The Indian presence in the Gulf predates the oil economy, rooted in centuries of Indian Ocean trade. Traders, financiers and seafarers served early Gulf economies; after the oil boom, Indian labour and expertise helped build modern cities (Jain, 2025). India therefore helped build the modern Gulf alongside Gulf capital, local leadership and other migrant streams. This reciprocal historical depth gives contemporary partnerships a foundation of familiarity and trust that purely transactional ties cannot easily replicate.

Productive capacity and the fiscal base

India engages the Gulf from a position of economic expansion, a diversifying export base and a state that increasingly designs and produces its own defence equipment. Pakistan engages from recurrent fiscal stress, a narrow export base and repeated recourse to external financing. The sharpest single indicator is defence sourcing. Chinese suppliers accounted for 81 per cent of Pakistan's major arms imports in the period 2020 to 2024, a rise from 74 per cent in the preceding five years, while India diversified its suppliers and reduced its import dependence as domestic production grew (SIPRI, 2025). Concentration

of this order is the material signature of dependence, and it constrains the autonomy of the state that carries it.

FOUNDATIONS COMPARED: A SYMMETRIC VIEW

Dimension	India	Pakistan
Migrant reach	Approximately 9.8 million nationals across the six GCC states; roughly 2.65 million in Saudi Arabia.	Approximately 11 million abroad, the majority in the Gulf; roughly 2.64 million in Saudi Arabia.
Gulf remittances	Gulf states supplied close to 38 per cent of 118.7 billion dollars in 2023 to 2024.	Record 41.6 billion dollars in 2025 to 2026; Saudi Arabia and the UAE close to half the total.
Trade with Saudi Arabia	Bilateral trade of about 41.88 billion dollars, 2024 to 2025.	Bilateral trade of about 5.4 billion dollars in 2024, roughly an eighth of India's (periods differ).
Defence sourcing	Diversified suppliers and expanding domestic production.	China supplied 81 per cent of major arms imports, 2020 to 2024.

Dehyphenation and the Independent Valuation of India

The Gulf once read South Asia through a hyphen, weighing India and Pakistan and tilting towards Islamabad on religious solidarity. That reading has shifted towards an independent valuation of India, driven by economic and strategic interests (Samaan, 2019).

The demolition of the Babri Masjid in 1992 strained India’s regional standing and gave Pakistan an opening. Sustained economic engagement, high-level contact and bilateral agreements rebuilt the relationship. The shift became clearest when Gulf governments responded cautiously to the 2019 Kashmir changes while cooperation with India continued, including the UAE’s highest civilian honour for the Indian Prime Minister (Gulf International Forum, 2024).

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Care is required, because dehyphenation is a change of weighting rather than an erasure. Gulf governments continue to maintain relationships with Pakistan, and each capital calibrates its position according to its own interests, distinguishing bilateral statements from the collective positions of the Organisation of Islamic Cooperation and separating symbolic gesture from material cooperation. The accurate reading is that the Pakistan factor no longer vetoes India's Gulf relationships, and that India is now valued for the economic, technological and human resources it brings. Silence on a contested question reflects a judgement of interest, and the interest now points towards New Delhi (Atlantic Council, 2025).

Saudi Arabia: Security Commitments and Sovereign Choice

Saudi Arabia presents the clearest case of the security model and its limits. Riyadh and Islamabad signed a Strategic Mutual Defence Agreement on 17 September 2025, committing each to treat aggression against one as aggression against both, and in August 2026 the arrangement widened into the Mecca Joint Defence Agreement, joined by Turkey, with a secretariat established in Riyadh (Middle East Institute [MEI], 2025; Al Jazeera, 2026). The language echoes collective defence and the framing invokes Islamic solidarity. The four questions clarify what the arrangement delivers when equivalent functions are compared.

On commitment, the pact promises mutual defence in principle, its operative clause treating an attack on one as an attack on both (Vivekananda International Foundation [VIF], 2025). India holds no such clause with Riyadh, and offers instead a deepening economic and energy partnership. On capability, the promise meets a hard constraint. Pakistan's security relationship with the Kingdom rests on training missions and troop presence of long standing, yet the state that offers the guarantee sources four fifths of its major weapons from a single external supplier and fights recurrent battles with its own solvency (SIPRI, 2025). A guarantor so placed offers assurance whose credibility rests on circumstances it does not control. On performance, no contingency has yet required Pakistan to expend blood and treasure in the

Kingdom's defence, and the analytically honest position is that the pact's operational value remains unproven rather than demonstrated (Gause, 2025).

The collective defence framing invites a sober comparison with a functioning alliance, which possesses joint command, agreed financing, interoperable forces, standing consultation and clear political authorisation for the use of force. The Mecca arrangement, on the available evidence, provides declaratory solidarity and a nascent secretariat rather than the integrated apparatus that converts a promise into a capability (Maheep, 2026a). It should be read as purposeful Saudi statecraft, an insurance policy taken out precisely because the Kingdom judged its established external guarantor less reliable than before, and it signals the diversification of dependence rather than the achievement of autonomy.

India's engagement with Riyadh proceeds on a different track through trade, investment, energy and a widening institutional relationship that does not ask Saudi Arabia to fight anyone's war. Bilateral trade reached roughly 41.88 billion dollars in the financial year 2024 to 2025, roughly eight times the value of Saudi–Pakistan trade, and Saudi investment into India has grown markedly over the past decade, binding the two economies through capital as well as labour and energy (Observer Research Foundation [ORF], 2025; Embassy of India Riyadh, 2025). The scale of that asymmetry frames the deeper question of why Riyadh should deepen economic cooperation with India while retaining security cooperation with Pakistan, and the answer lies in the complementarity of functions rather than in any contradiction. Saudi diversification is purposeful statecraft that assigns different partners to different needs. India answers the requirements of Vision 2030 for a market, a workforce, technology and capital, while Pakistan answers a narrower demand for manpower and the reassurance of a shared security posture. The two relationships occupy separate niches within a single hedging strategy, and recognising this is essential to a fair reading of Gulf agency.

SAUDI ARABIA: THE FOUR QUESTIONS

Dimension	India	Pakistan
Commitment	Deep economic and energy partnership; no mutual defence clause.	Treaty-level mutual defence pledge, widened at Mecca, August 2026.
Capability	Market scale, investment and technological cooperation for Vision 2030.	Guarantee rests on a military dependent on one arms supplier and external financing.
Performance	Continuous, measurable economic delivery.	Defence pledge untested by any real contingency.
Protection	Protects its own nationals; sustains the economy they help run.	Exports manpower into another state's security architecture.

United Arab Emirates: Economic Depth and Practical Trust

The United Arab Emirates demonstrates the market and society model at its fullest. The Comprehensive Economic Partnership Agreement, signed in February 2022 and in force from May 2022, was India's first such pact with a Gulf state. Bilateral merchandise trade reached USD 101.25 billion in the financial year 2025-2026, crossing the hundred billion mark for a second consecutive year, with non-oil commerce approaching two thirds of the total (UAE-India CEPA Council [UICC], 2026). The two governments have set a separate target of 200 billion dollars by 2032, a goal to be distinguished carefully from trade already achieved. The Emirates now rank among India's largest trading partners, and India stands as the second largest partner of the Emirates.

The relationship extends well beyond merchandise. Emirati investment flows into Indian energy, ports, logistics, financial services and infrastructure, and India's unified payments interface has been extended into the Emirates, integrating the two economies at the level of everyday transaction (ORF, 2026). These institutional links reduce the uncertainty of every subsequent exchange, and they exemplify the way a dense web of agreements converts goodwill into predictable cooperation. Energy cooperation includes strategic

ISSN: 3108-0405 (O)

petroleum reserve participation, so that the Emirates now contribute to the security of India's supply as well as to its volume, and the I2U2 grouping links the two states with Israel and the United States in a minilateral built around food, water, energy and technology, giving India a foothold in a regional architecture that Pakistan does not share (Suri & Taneja, 2023). The consecration of a traditional Hindu temple in Abu Dhabi stands as a public act of recognition of the community that helps to run the Emirati economy, and it should be read as symbolic inclusion rather than as any change in citizenship or labour law, since recognition and rights are distinct and the distinction must be preserved.

Pakistan maintains a genuine relationship with the Emirates through labour, remittances and finance. The comparison rests on kind rather than presence, since a relationship that integrates two economies stands beside one that supplies labour on a narrower and more transactional base. Where financial support has flowed to Islamabad, it has done so through arrangements whose terms belong to the record of the relevant central banks and lenders rather than to interpretation (International Monetary Fund [IMF], 2025). The durable point stands without exaggeration. India's Emirati partnership builds shared capability.

THE UAE: THE FOUR QUESTIONS

Dimension	**India**	**Pakistan**
Commitment	Comprehensive economic partnership in force since 2022; 200 billion dollar target for 2032.	Labour cooperation and periodic financial arrangements.
Capability	Two-way investment, payment integration and energy reserves.	Manpower supply and remittance flows.
Performance	Trade of 101.25 billion dollars in 2025 to 2026; non-oil trade nearing two thirds.	Labour presence sustained; financial relief sought at intervals.

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Dimension	India	Pakistan
Protection	Nationals embedded across the economy, with growing institutional recognition.	A migrant workforce concentrated in a narrower band of sectors.

Qatar, Bahrain, Kuwait and Oman: The Supporting Tier

Qatar, the first stop on 5 July 2026, illustrates the conversion of an energy relationship into a strategic one. India and Qatar concluded a strategic partnership in February 2025, and liquefied natural gas supply extends on long horizons that reach towards the middle of the century, giving India a durable stake in Qatari energy and Qatar a dependable market of the first rank (MEA, 2026a). The earlier resolution of the case of eight Indian naval veterans, who had faced grave jeopardy before their release and return, demonstrated the reach of India's consular diplomacy and the trust that had accumulated between the two capitals. India commended Qatari mediation in the regional crisis and conveyed appreciation for the safety of its community, the register of a partnership grounded in mutual regard. Qatar, sharing the world's largest gas field with Iran and navigating the pressure of secondary sanctions, has reason to value a partner that offers commerce and stability without demanding alignment, and India supplies exactly that. Pakistan's relationship with Doha rests on labour and training rather than agreements of comparable institutional depth.

Bahrain, visited on 6 July 2026, hosts the geography of the United States Fifth Fleet and a long-settled Indian community, and it occupies a position of particular exposure, having felt the reverberations of the regional conflict at close quarters. The audience with the King and the Crown Prince marked the consolidation of a relationship that India has advanced through community welfare and steady diplomacy (MEA, 2026a). Bahrain's smaller scale and its proximity to the theatre of confrontation make the reliability of its partners a matter of acute concern, and India's record of protecting its nationals and sustaining trade through disruption answers that concern directly. Pakistan's connection to Manama has included the recruitment of personnel into Bahraini

ISSN: 3108-0405 (O)

security forces, a link that expresses the security model in miniature against India's societal one, since it offers manpower for internal security rather than the economic and human depth that India brings.

Kuwait, the longest stop from 7 to 9 July 2026, carried particular weight. India and Kuwait elevated their relationship to a strategic partnership in December 2024, and the call on the Crown Prince underscored the political investment on both sides (MEA, 2026a). Kuwait holds a distinctive place among the Gulf States, since it has sustained the region's most assertive parliamentary tradition, though that tradition entered a period of suspension when the Emir dissolved the National Assembly and suspended parts of the constitution on 10 May 2024 for a constitutional review of up to four years (Carnegie Endowment, 2025). It hosts an Indian community approaching a million people whose remittances and labour are woven into the national economy, and the relationship rests on energy, trade, investment and a joint ministerial architecture that gives cooperation an institutional spine.

The contrast with Pakistan is instructive on the question of implementation. The Kuwait–Pakistan defence cooperation agreement signed in June 2023 was ratified only on 26 July 2026, an interval of three years between signature and ratification (Maheep, 2026b). The public record does not fully explain where the delay originated or whether cooperation proceeded in the interim, and the honest reading treats the gap as a question about implementation rather than a proven failure of capability. What can be said with confidence is that India's Gulf agreements have tended to move from signature to entry into force within months and to be followed by visible delivery, and that predictable rhythm is itself a form of soft power, the demonstration of a state that keeps its commitments on a dependable schedule.

Oman, the final stop on 9 and 10 July 2026, completes the arc. The India–Oman Comprehensive Economic Partnership Agreement, signed on 18 December 2025 and in force from 1 June 2026, was Oman's first such bilateral pact since its agreement with the United States, and it made India only the second nation to secure comprehensive economic terms with the Sultanate (MEA, 2026b). Its strategic value lies partly in geography, since the agreement

ISSN: 3108-0405 (O)

and the maritime cooperation that accompanies it open a route to Gulf commerce that reduces exposure to the chokepoint of the Strait of Hormuz, a consideration of the first importance in a season of regional conflict. Maritime cooperation, mediation and the quiet reliability of the relationship make Oman a low-maintenance, high-trust partner, and the CEPA converts that trust into durable institutional form.

THE SUPPORTING TIER: ONE GRID

Dimension	India	Pakistan
Commitment	Strategic partnerships with Qatar (2025) and Kuwait (2024); CEPA with Oman (2025).	Labour ties; a Kuwait defence pact of 2023 ratified only in 2026.
Capability	Energy, investment, consular reach and maritime access.	Manpower and security recruitment on a narrower base.
Performance	LNG horizons, veterans' case resolved, Hormuz-bypassing trade route opened.	A three-year gap between signature and ratification (Kuwait pact).
Protection	Community welfare central to every stop on the July 2026 tour.	Security recruitment rather than societal integration.

Regional Crisis, Iranian Resilience and the Limits of External Guarantees

The conflict that ran through 2025 and into 2026 served as a stress test of every partnership in the region, and it must be dated precisely rather than smeared into a single undifferentiated war. In June 2025 the United States struck Iranian nuclear facilities, and on 23 June Iran retaliated against the Al Udeid air base in Qatar, the largest American installation in the region. Iran gave advance warning, the base had been evacuated, Qatari air defences engaged the incoming missiles with a single strike reaching a radome, and no casualties followed before a ceasefire took hold within days (Al Jazeera, 2025). The episode carried a message the region absorbed. The most prominent symbol of external protection had become a target, and the protection it represented proved conditional.

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The economics of that night reveal the deeper vulnerability. Qatar reported the firing of interceptors in defence of the base, each advanced interceptor costing in the order of several million dollars, so that the direct expense of a single evening of defence ran into the tens of millions even before the wider military and aviation disruption is counted (Jewish Institute for National Security of America [JINSA], 2025). The pattern of cost inversion, in which a defender expends fortunes to intercept comparatively cheap projectiles, defines the fragility of a rented air-defence posture, and it recurs across the theatre. A cheap one-way drone set against an early-warning radar of great value expresses the same asymmetry, and the strategic reckoning is that external protection purchased at this exchange rate cannot be sustained indefinitely (Maheep, 2026c). The analytical point concerns conditional guarantees, interceptor burn-rate and cost inversion, not accusation, and it explains why the Gulf States have begun to question the sufficiency of a security posture that depends on the presence and the will of a distant power.

India shared the crisis exposure. Disruption to Hormuz threatened energy and shipping, airspace closures complicated movement of nationals, and instability endangered communities and remittances. Both India and Pakistan face these shocks, underscoring that crisis-management capacity, rather than a paper guarantee, is the true measure of partnership value (Dawn, 2026).

The reliability of the American guarantee is best assessed by specifying the commitment and the response. When Saudi Arabia and the United States concluded a strategic defence agreement in November 2025, and the Kingdom received the status of a major non-NATO ally, the arrangement withheld the explicit pledge that an attack on the Kingdom would be treated as an attack on the United States, a pledge Qatar had received only weeks earlier (Atlantic Council, 2026). The lesson the Gulf drew was direct. External guarantees arrive with conditions, they shift with the temperament of the guarantor, and a prudent state builds alternatives. This is the setting in which the Saudi turn towards Pakistan and Turkey must be read, as diversification of dependence under an unreliable umbrella rather than the attainment of self-reliance.

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The Mecca pact itself illustrates the difficulty. It names no common enemy, and its principals declared it purely defensive and open to any brotherly nation that wishes to join, yet an alliance without a defined threat that each member needs the others to face lacks the binding logic that holds a genuine coalition together (Maheep, 2026a). The three signatories combine considerable manpower and materiel on paper, and the arrangement now has a secretariat and a name, yet it possesses none of the integrated command, financing and interoperability that would convert a shared declaration into a shared capability. The paradox deepens when the Mecca text is set beside the guarantees the same capitals sought from Washington, for the Gulf States have reached simultaneously for an American umbrella they distrust and a Muslim coalition they cannot yet operationalise, which is the behaviour of states hedging under uncertainty rather than of states that have secured their own defence. India's relevance to this picture is that it offers neither an untested guarantee nor a rented shield, but the economic and human depth that strengthens a partner from within.

The crisis also corrected a persistent misreading of Iran. Iran is a large and deep state, its total area of roughly 1.65 million square kilometres approaching half that of India and its population exceeding ninety million, its terrain of mountain and plateau conferring a strategic depth that the compact Gulf States do not possess (Central Intelligence Agency, 2026). Iran stands apart from Iraq, Libya and Venezuela, and a strategy directed against a dispersed and redundant command structure risked a wider war it could not quickly end (Maheep, 2025). Iranian resilience rests on the decentralisation of command, the redundancy of systems and the dispersal of assets, so that pressure applied at one point is absorbed and reconstituted at another, and this pattern of decentralised attrition deserves study on its own terms rather than dismissal (Maheep, 2025).

Pakistan's Domestic Political Economy

The mechanism at the centre of this article can now be stated and tested. Geopolitical relevance attracts external resources, the use of those resources

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shapes the incentive to reform, and domestic outcomes then determine the credibility of external commitments. The criticism that follows is directed at policy and at the structures of power, and never at the dignity of Pakistani citizens or the men and women in uniform who bear the consequences of decisions they do not make.

Pakistan has converted its strategic location into external rent across successive eras, through the Cold War, the Afghan wars and the period after 2001, and the pattern has been consistent (Maheep, 2026d). Relevance generates financing, financing relieves immediate pressure, and relief postpones the structural adjustment that would build durable capacity. The result is a state that returns repeatedly to external creditors and arrives at each negotiation with diminished leverage. A polity in which civilian institutions have been subordinated to military authority for long stretches has directed national resources towards security priorities while human development has lagged, and on the measures that matter for ordinary lives Pakistan trails peers such as Bangladesh and Vietnam that invested in productive capacity rather than strategic rent (UNDP, 2025).

The China relationship illustrates the concentration this path produces. The China–Pakistan Economic Corridor promised industrial transformation and has too often delivered strategic enclosure, with debt terms and sectoral outcomes that warrant honest examination rather than slogans. In Balochistan the corridor has proceeded amid documented grievances over the distribution of benefit and the conduct of security operations, and the legitimate rights and political dissent of citizens must be distinguished carefully from militant violence. Climate exposure compounds the strain, as recurrent flooding devastates communities the state lacks the fiscal room to protect. A security posture that treats the young as a resource for others' defence imposes a human cost that any humane analysis must name, and it substitutes the export of manpower for the cultivation of opportunity.

The credibility of the security offer depends finally on capability, and capability is exactly what the rentier path strains. A military sourcing at that level of concentration operates within the constraints it imposes, on

ISSN: 3108-0405 (O)

replenishment, maintenance and the sustained supply of spares, and a treasury that returns to external creditors at each cycle underwrites a distant commitment from resources it does not fully command (SIPRI, 2025). The point concerns credibility rather than possibility, since dependence conditions a guarantee in ways a diversified and self-producing military would avoid. The Islamic collective defence framing, however resonant, cannot by itself supply the joint command, financing and interoperability that an operative guarantee requires, and the analogy with a functioning alliance weakens at precisely the points where delivery would be tested (Maheep, 2026a).

The multi-alignment that courts Washington, Beijing, Riyadh, Ankara, Tehran and Moscow at once is often praised as dexterity. The sharper reading is that it is the diplomacy of a state seeking rent from every quarter while resolving its dependence on none, so that a partner to all becomes a dependable ally to none, acquiring the appearance of options while the substance of autonomy erodes (Maheep, 2026d). The sectarian fault lines within Pakistan, together with its cautious opening towards Iran, further complicate the religious solidarity on which its Gulf security offer is built, since a state divided at home and hedging towards Tehran offers Riyadh a more ambiguous assurance than the framing suggests. The proposition holds across each link. Relevance without reform narrows the very autonomy that relevance was meant to secure, and the narrowing is measurable in the arithmetic of dependence rather than merely asserted.

Human Security and Protection Compared

Human security is where strategic autonomy meets ordinary lives. When fighting in June 2025 endangered Indian nationals in Iran and Israel, New Delhi launched Operation Sindhu on 18 June. By 27 June it had brought 4,415 home, coordinated safe passage with Tehran and neighbouring governments, and assisted Nepali and Sri Lankan citizens (MEA, 2025; Business Standard, 2025).

Protection extends beyond rescue. It includes recruitment debt, wage security, interrupted study and the difficulty of return. Along the India–Gulf corridor,

ISSN: 3108-0405 (O)

recruitment costs and borrowing place substantial burdens on low-wage migrants, consuming earnings the journey was meant to secure (Verité, 2024; Naidu et al., 2023). A state's performance must therefore be assessed across that whole arc, from ethical recruitment and wage protection to safe return. India has developed important elements of this machinery through eMigrate, labour cooperation with Gulf governments and a consular network serving a community approaching ten million. Gulf partners have contributed through the hosting and care of Indian communities during crises.

Pakistan also has millions of its people in the Gulf and a corresponding responsibility to protect them. A rigorous comparison therefore requires evidence of both states' responses to comparable emergencies. India's record demonstrates the operational value of transport capacity, diplomatic access, administrative coordination and sustained preparedness. Pakistan's recurrent fiscal constraints raise a corresponding question about the resources available for citizen protection, although those constraints alone cannot establish the outcome of a particular operation. Human security depends on the fiscal and institutional foundations that make action possible. India's evacuation record gives its strategic autonomy a tangible human meaning: the capacity to reach its citizens in danger and bring them home.

From Sindoor to RAKSHA: Preparedness as Foundation

Strategic autonomy is a capacity earned in factories, on runways and at sea. Operation Sindoor, in May 2025, demonstrated a state willing to use force for defined security objectives, reflecting years of preparation. That capacity rests partly on a growing defence-industrial base and domestic production (Maheep, 2026e). RAKSHA is the author's term for these foundations: readiness, industrial depth and the will to protect. India remains a significant arms importer, so autonomy is a trajectory rather than a finished achievement.

For the Gulf, the implication is practical. A partner able to produce, maintain and replenish equipment can offer training, co-development, maritime awareness and disaster response. Defence cooperation of this kind builds capability through shared expertise, production and maintenance; its value

depends on technology transfer and the partners' capacity to sustain delivery (Taneja, 2025).

India's strategic trajectory is towards converting relevance into capability, and capability into the freedom to choose. For Gulf partners pursuing economic transformation and greater security autonomy, the value lies in cooperation that builds industry, strengthens preparedness and protects people. Such cooperation adds a durable dimension to the security relationships they already maintain. Sindoor demonstrated the willingness to act. The industrial base, still maturing, supplies a growing share of the means. RAKSHA, as this article uses the term, names the material foundation for India's autonomy, and for the capability it can share with Gulf partners.

Conclusion

The Gulf is a shared arena, and India and Pakistan have walked it for two generations. They no longer walk it on the same ground. India arrives with a complex of labour, market and society: close to ten million of its people woven into the daily life of six economies, comprehensive agreements that move from signature to delivery, payments and energy integration that make the next transaction cheaper than the last, and a demonstrated capacity to bring its citizens home when the region burns. Pakistan arrives with a complex of rent and security: manpower exported into another state's architecture, religious solidarity offered as a diplomatic language, and a treasury that returns, cycle after cycle, to external creditors. The four questions, applied to equivalent functions, yield one finding. Commitment is only a sentence until capability stands behind it. Capability is only a claim until performance is shown. Performance is measured, at the last, in the protection of people.

On the functions the Gulf now weights most heavily, namely economic delivery, institutional continuity and citizen protection, India is the superior partner. It is superior through CEPA and strategic councils, through trade that has already crossed a hundred billion dollars with the Emirates, through LNG horizons that run toward mid-century, through an evacuation that brought 4,415 nationals home from Iran and Israel within nine days, and through a

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consular reach scaled to a community the size of a country. Pakistan retains a narrower niche: the export of soldiers and workers into another state's defence and labour markets. That is a relationship of a different kind. It is not the relationship on which Vision 2030, Hormuz insurance, or the safety of close to ten million Indian residents will be built.

The security offer that Islamabad extends cannot carry the weight placed upon it. The Strategic Mutual Defence Agreement of September 2025 and the Mecca arrangement of August 2026 speak the language of collective defence. They do not yet field the command, the financing, or the interoperable forces that turn a declaration into a shield. A guarantor that sources four fifths of its major arms from a single supplier, and that finances itself by recurrent appeal, offers a promise whose fulfilment depends on circumstances it does not control. When the test of 2025 and 2026 arrived, with bases struck, airspace closed and interceptors burned at ruinous cost, it was not that pact which steadied the Gulf. It was trade that continued, communities that were sheltered, and states that could move their people.

The cost of Pakistan's path is paid first at home. A political economy organised around geopolitical rent postpones reform that would educate, employ and protect its population. A security-first state draws its young into uniform and external conflicts while the productive base remains narrow and the external account fragile. That is not a foundation on which a partner can rest a frontier; it consumes the capacity a guarantee requires.

India chaired the eighteenth BRICS summit in New Delhi on 12 and 13 September 2026, with the United Arab Emirates seated as a full member and Saudi Arabia present on terms of its own choosing, a distinction that is itself an expression of Gulf hedging (BRICS, 2026). The stage is not incidental. It is the public form of a private calculation already made in Riyadh, Abu Dhabi, Doha, Manama, Kuwait City and Muscat. Diversified relationships widen autonomy when they create usable alternatives and build domestic capacity. India has taken that path. Where the Gulf weights delivery, continuity and the protection of people, it has turned to the partner that strengthens it from within. The freedom to choose is the freedom a state earns, by keeping its

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commitments, by building what it deploys, and by bringing its own people home.

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