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## ***The Persian Gulf's pivot: Betting on India, sidestepping Pakistan***

With New Delhi – and Tel Aviv – rising as strategic partners, Arab states of the Persian Gulf are recalibrating their historic ties with Islamabad, revealing a deeper realignment in West Asia's power matrix.



Photo Credit: The Cradle

From the 22 April outbreak of military escalation between [India and Pakistan](#) until the announcement of a ceasefire on 10 May, the world held its breath, fearing that the two nuclear-armed neighbors might slide into a full-scale war threatening regional security and stability.

International mediation rushed to contain the worst crisis in decades between the two countries, culminating in a truce forged through intensive communications involving more than 30 nations. But questions remain over the durability of this agreement and its capacity to forestall renewed violence in [Kashmir](#) – a flashpoint since the British colonial partition of the Indian subcontinent in 1947.

Amid the escalation, attention turned to the positions of regional powers, chief among them the Arab monarchies of the Persian Gulf, who found themselves navigating a dual bind:

traditional strategic ties with the Islamic Republic of Pakistan on one hand, and deepening economic entanglements with Hindu-majority India on the other.

Saudi Arabia, long regarded as Islamabad's strategic hinterland, appeared more cautious this time, refraining from condemning Indian shelling and adopting a balanced rhetoric – even hastening to [mediate](#). This shift reflects a broader realignment, driven by Riyadh's Vision 2030 and a prioritization of economic interests clearly tilted toward New Delhi.

### **A web of realignments**

Indian Prime Minister Narendra Modi was in Jeddah on a [historic visit](#)—the first in four decades—when news broke of a deadly attack in Indian-occupied Kashmir. Despite cutting his trip short, Modi held extended talks with Saudi Crown Prince Mohammed bin Salman (MbS), resulting in a joint statement that condemned the attack and rejected "linking terrorism to any race, religion, or culture."

The statement was the culmination of a trajectory that began with the 2006 New Delhi-Riyadh accord, which evolved into a strategic partnership by 2010. Tellingly, Modi echoed this rhetoric in his first televised address post-escalation, [warning](#) Pakistan to dismantle its "terror infrastructure" or face consequences.

Persian Gulf states [moved quickly](#) to contain the tension and avert an open confrontation between the nuclear powers. Saudi Arabia led the mediation with intensive outreach to both sides, capitalizing on its strong ties with Islamabad and New Delhi. Qatar engaged both leaderships, affirming support for peaceful resolutions, while the UAE underscored its commitment to diplomatic conflict resolution.

Still, questions linger: Why were Persian Gulf capitals so quick to defuse the South Asian flashpoint while showing far less urgency in cases like Gaza, Lebanon, or Sudan? And more crucially, should war erupt again between the neighbors, which side would they favor?

### **Islamabad's waning strategic value**

Few dispute that Persian Gulf-Pakistan ties are not at their strongest. Several factors account for this drift. Saudi-Pakistani relations, historically steeped in military, religious, and strategic depth, have faced setbacks.

Riyadh relied heavily on Pakistani military expertise: Around 30,000 Pakistani troops were stationed in the kingdom during the 1970s and 1980s, training Saudi forces and even providing nuclear umbrella assurances.

That intimacy waned after two key developments: the emergence of Al-Qaeda in the Arabian Peninsula, later morphing into ISIS, with Pakistan viewed as a source for such jihadist groups; and Islamabad's 2015 refusal to join the Saudi-led war on Yemen.

India seized the vacuum left by its arch-rival's waning clout, advancing its profile across West Asia. A top consumer of Persian Gulf fossil fuels and the region's fastest-growing oil importer, New Delhi became indispensable to Persian Gulf economies. At the same time, the Indian tech sector began attracting massive investment from Persian Gulf sovereign wealth funds.

India's increasing closeness with the US and its growing naval capabilities in the Arabian Sea drew the attention of Gulf capitals seeking to expand their foreign relations. With the emergence of the Israeli occupation state as a major arms supplier to New Delhi due to the [strength of their relations](#), the eyes of normalization-seeking Persian Gulf countries turned to the opportunities India offers in this field.

Dr Nabil Sarour, a researcher in international relations and an expert in Asian affairs, tells *The Cradle*:

**“India is a key partner in infrastructure, energy, and technology—areas where it eclipses Pakistan. With over 10 million Indians working across the Gulf, the human link is also far stronger than with Pakistan. Add to that India’s massive imports of Gulf oil and gas, and the trade volumes speak for themselves.**

**India brands itself as a moderate, secular partner, distancing itself from sectarian entanglements. By contrast, Pakistan’s overt Islamic affiliations are a source of unease for Gulf states. The geopolitical shift toward India, especially its tightening bonds with the Israeli enemy, aligns squarely with Gulf interests.”**

He adds:

**“Ultimately, it becomes clear that economic and developmental factors, along with India’s political stability and strategic vision aligned with Gulf interests, tilt the balance in favor of India. Conversely, despite historical and religious ties with Arab countries, differing priorities and strategies with Pakistan reduce its appeal as a strategic partner.”**

### **The economic stakes**

India–Persian Gulf economic ties surged as the latter launched ambitious transformation blueprints. Saudi Arabia alone has pledged more than \$100 billion in Indian investments, half earmarked for the massive Al-Saeed refinery. The UAE plans to pour in \$50 billion, while Qatar has committed \$10 billion.

Trade between India and the Arab world hit \$218 billion in 2024, a record high. The UAE is India’s [top trading partner](#) in the region, followed by Saudi Arabia. Qatar and Oman round out the top five.

With over 9 million Indians versus three million Pakistanis in the Persian Gulf, Indian companies dominate regional markets. The UAE hosts over 83,000 Indian firms; Bahrain has 7,500; Qatar and Oman 6,000 each; Kuwait 4,000; and Saudi Arabia more than 400.

But the Persian Gulf's real pivot toward India lies in a US-backed India-to-Europe route under development – the International Middle East Corridor ([IMEC](#)) - unveiled at the 2023 G20 summit in New Delhi. With US, French, German, Italian, Saudi, and Emirati participation, IMEC is billed as a [counterweight](#) to China's Belt and Road Initiative (BRI). It envisions a trade and tech link between India and Europe via the Persian Gulf *and Israel* – recasting global trade flows.

IMEC comprises two routes: an eastern maritime path from Mumbai to Dubai and a northern terrestrial link via Saudi Arabia, Jordan, Israeli-occupied territories, and into Europe. Beyond cargo, it includes advanced infrastructure: fiber optics, hydrogen pipelines, and digital energy grids to underpin renewables and the digital economy.

The project's significance is strategic: India rejects China's BRI as it traverses disputed Kashmir, while Pakistan is a central BRI partner via the China–Pakistan Economic Corridor ([CPEC](#)). In this regional bifurcation, Persian Gulf states emerge as pivotal nodes between east and west.

Saudi Arabia and the UAE aim to become critical hubs in global supply chains – key to their economic visions. IMEC offers an investment magnet in energy, tech, and infrastructure, while boosting Persian Gulf political clout through intercontinental partnerships. As Dr Sarour explains:

**“The Gulf’s rapid mediation in this crisis stems from its core economic and strategic imperatives. IMEC, threading India, the UAE, Saudi Arabia, and the Red Sea to Europe, is vital for global trade and energy flow. Billions are being sunk into ports and logistics along this corridor. Regional stability is non-negotiable for returns on these investments.”**

### **What's at stake for the Persian Gulf?**

The India–Pakistan escalation is no distant affair for the Persian Gulf. Over 12 million Indians and Pakistanis live and work in the region. Bilateral trade with India alone tops \$160 billion. Airspace closures and suspended flights have disrupted supply chains and raised freight costs by up to 30 percent. Oil and gas flows through maritime chokepoints are also at risk, pressuring inflation and labour markets.

Dr Sarour points out:

**“Saudi Arabia is asserting itself as a regional actor, not just a western client. Its foreign strategy is shifting. Gulf mediation isn’t just diplomatic theater – it’s about safeguarding regional stability, strategic influence, and economic resilience.”**

On the global stage, any conflict between India and Pakistan would draw in entrenched alliances: India with the US, France, and Israel; Pakistan with China, Turkiye, and Iran. This balance of power calculus leaves little room for neutrality.

In this fraught equation, Persian Gulf states are not hedging out of principle but out of pragmatism. Full alignment with either India or Pakistan risks collapsing vital partnerships.

By casting themselves as mediators, Gulf capitals are not seeking neutrality – they are safeguarding their stake in the regional order. Stability, for them, is no longer a diplomatic posture; it is a strategic imperative.

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