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Gulf Goals: Pakistan's Middle East Balancing Act between Competing Rivals and Allies

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ABSTRACT

Pakistan purports to play the perilous game of negotiating the Gulf's shifting sands, but in reality it is a game of diplomatic whack a mole. Sandwiched between the Saudi petro-dollar; the Iranian pipeline; the Turkish ambition; the Emirati influence and the ever present Israeli specter, Islamabad has no grand strategy only a set of reactive, contradictory stances that annoy everyone and offend everyone. This article debunks the fantasy of Pakistan as savvy "balancer" in the Middle East. Through foreign policy analysis and interviews with a dozen former Pakistani diplomats and two former foreign secretaries, we reveal three deadly balancing acts. First, the Saudi Iran balancing act: Pakistan refuses to meet Riyadh's demands for battle-hardy troops in Yemen, while accepting Saudi bailouts and deferred payments for oil a disingenuity that both Riyadh and Tehran now view with disgust. Second, the Turkey UAE Saudi triangle eg. Pakistan's military agreements with Turkey (including drones and training) jeopardize its economic ties with Abu Dhabi, its largest investor in the real estate and banking sectors, making Saudis wonder if Islamabad is friend or foe. Third, the Israel trap like the US and Gulf regimes quietly lobby for ties but any move would blow a fuse on Pakistan's street from the religious right to the intelligence agencies igniting an internal time bomb. The 2022 economic crisis has reduced Pakistan to a mendicant; Gulf bailouts carry a price to diplomatic freedom. Then, there is the border harassment and the gas pipeline ultimatum from Iran. This study shows Pakistan's Gulf ambitions are a mirage. The Saudis want manpower, the Iranians want the pipeline and the Americans want Israeli flags in Islamabad and none of them are patient. It finds that Pakistan needs to drop ideological pretensions and get tough on economic survival, including an official neutrality in the Gulf and imported energy sources from Russia and Central Asia. Without this, Pakistan will soon be the sacrificed chess piece.

Keywords: *Gulf Policy, Strategic Hedging, Saudi-Iran Rivalry, Israel Normalization, Turkey-UAE Competition, Diplomacy.*

Introduction

Over decades, Pakistan has established a meticulously built geopolitical identity as a masterful diplomatic hedger in the Muslim world, capitalizing on its location between the Gulf and its reputation as the only nuclear armed Islamic state in the world, and profound religious and cultural affinities to establish itself as an intermediary among competing centers of power in the region (The Statesman 2025). This self-imposed role was based on a long history of military collaboration with Saudi Arabia, such as Pakistani pilots flying Saudi jets against Yemeni incursions in 1969, the presence of troops to defend the Saudi kingdom during the Cold war and the 1991 Gulf War, and more recent security support that led to a Strategic

Mutual Defence Agreement signed in September 2025 (The Diplomat Islamabad managed to overcome the Cold war alliances, to balance the United States and China, and maintain connections between competing power centres, gaining the reputation of a diplomatic swing state that can move between conflicting regional ambitions (The Statesman 2025). By 2025, the foreign policy of Pakistan had changed to be more geopolitically oriented with the Pakistani leadership resolving a ceasefire with the United States and the Gulf and re-setting their strategic focus to the Middle East, what analysts have defined as a Look West shift (The Diplomat 2025; Quwa 2025). This historical positioning is on the verge of breaking, however, and what was once being used to describe Pakistan as a nimble hedger, has turned into a liability in a more fragmented and competitive Gulf environment.

The present reality that faces Pakistan is that of economic meltdown, diplomatic paradox, and pressure by all the major actors of the Gulf region, which shows the lack of a coherent regional policy. The Pakistan economy has been in crisis, barely escaping default in 2023 and receiving a 7-billion IMF bailout in 2024 with strict conditions, which requires constant overseeing of reforms, with the Fund approving an additional 1.2-billion payment in December 2025 only after Islamabad had met strenuous fiscal targets such as a primary surplus of 1.3 per cent This economic frailty has turned Pakistan into a strategic balancer into a beggar because bailout payments by the Gulf by Saudi Arabia and the United Arab Emirates come with strings that are not seen, but strangulation to diplomatic manoeuvre. Saudi Arabia, the country with around 2.23 million Pakistani expatriates and intending to invest about \$10 billion, requires combat troops in Yemen and greater defence integration, whereas the UAE, the third largest trading partner of Pakistan with bilateral trade surging over 10 billion and with 1.9 million Pakistani expatriates sending over 7 billion per year, would like to align with its strategic neutrality Meanwhile, Iran threatens ultimatums over the blocked gas pipeline and intensifies border militancy in Baluchistan, Turkey urges military and drone technology alliances to undermine its ties with Abu Dhabi, and Washington and Gulf monarchies whisper Iran toward a normalization of relations with Israel (Arab News 2025; The New Arab 2025). Pakistan lacks a consistent Gulf policy to address these conflicting demands. It instead indulges in reactionary, self-contradictory postures that estrange its allies without appeasing its rivals, swerving between populist rhetoric and inconsistent policy stances that have lost its credibility with Gulf partners who are ever more evaluating relationship on commercial grounds, not history (The Citizen 2025; The Friday Times 2025).

This article breaks the myth about Pakistan being a skilled hedger by concentrating on three deadly balancing errors which help to explain why the survival of this country lies in giving up ideological posturing in favour of harsh economic pragmatism. The initial one is the Saudi Iran tightrope whereby Pakistan declines the repeated requests by Riyadh to send combat troops in Yemen and yet still cashing Saudi bailouts and deferred payments with oil, a betrayal that both Riyadh and Tehran consider with increasingly disdain as Iranian president Masoud Pezeshkian publicly cheered the Pakistan Saudi defence pact as the start of a full-blown regional security system The second collapse is related to the Turkey UAE Saudi triangle where the further involvement of Islamabad in military relations with Ankara, including the transfer of drone technologies, the development of joint naval projects, and the signing of five memorandums of understanding on the exploration of oil and gas directly jeopardizes its economic relations with Abu Dhabi, who is one of the largest investors in the Pakistani real estate, banking, ports, and logistics markets The third failure is the Israel normalization trap, where any action of establishing any diplomatic links with Israel would trigger Pakistan

domestic street power of religious parties to intelligence groups to form an explosive internal crisis, but Washington and the Gulf monarchies are quietly pushing to have Pakistan join the Abraham Accords (Arab News 2025; Times of India 2025). Unless there is an underlying paradigm change towards formal neutrality in the Gulf conflicts and diversification of energy imports through Russia and Central Asia, Pakistan will be left the fate of a rejected chess piece losing its relevance to both its opponent and its ally (The Statesman 2025).

Literature Review

The three main concepts around which the academic literature on the middle power foreign policy in the Gulf has long been based are strategic hedging, bandwagoning and balancing. The concept of strategic hedging becomes the most applicable, in which states strive to achieve both risk reduction and maximization of opportunities and do so by involving a number of centres of power that are often in conflict without being completely committed to one alignment (Paul 2019). Pakistan is a time-honored example of a classic hedger in the South Asian context: the country has used its geographical location and nuclear potential to support relationships among competing camps (Rumi 2020). Nevertheless, researchers have observed that effective hedging demands economic independence as well as institutional strength to absorb external shocks, which is seldom the case with those states with a history of weak fiscal positions (Kaura 2024). The balancing literature has long considered the idea that middle powers can act to counter regional competitors by selective coalition formation, but more recent work suggests that Pakistan has limited military or economic capacity to be an effective balancer due to its internal security demands, and ongoing reliance on external financial assistance (Siddiqa 2025). Other theories such as bandwagoning that explain unconditioned backing with the most powerful patron do not also explain the behaviour of Pakistan since Islamabad has stoutly resisted Saudi requests to send combat troops to Yemen yet has taken Saudi financial packages (Malik 2023). The hedging literature is therefore a starting point with an important theoretical gap when it is applied to states where an economic collapse is being accompanied by a diplomatic fragmentation. This paper bridges that gap by exploring how the hedging capacity of Pakistan has been systematically undermined by the excessive financial dependence and into a nonsensical pattern of reactive postures.

Conventional narratives of relationships between Pakistan and Gulf States have offered a story of faithful alliance and bridge building, focusing on the strong military collaboration with Saudi Arabia as well as diplomatic overture to Iran. Over the decades, Riyadh and Islamabad have strengthened this security relationship, such as the Pakistani troops guarding Saudi borders throughout the 1990s Gulf War and through regular training missions under a 2018 cooperation agreement (Weinberg 2019). The pragmatist nature of Pakistani mediator efforts in Iran is evident in scholars pointing to the relative similarity in the Shia population estimated at between 20 and 25 per cent of the Pakistani society, historical civilisational relationships, and attempts to maintain dialogue even at times of increased Saudi Iranian competition (Pande 2020). In 2019, the then Prime Minister Imran Khan made a trip to Tehran to facilitate in the wake of attacks on Saudi oil facilities, which represented the ambition of the Islamabad to serve as a diplomatic bridge between the two competitors (Rafiq 2021). It has also been noted by the analysts that Pakistan has had a working relationship with Iran despite sectarian rifts being evidence of diplomatic dexterity, and historically, Islamabad had aspired to attain a balance and neutrality between Tehran and Riyadh (Kugelman 2022). None of these classic stories, however, comes before the full effects of the economic meltdown in Pakistan that followed in 2022 and have all failed to theorise how extreme financial

exposure can turn what seemed to be a strategic hedge into a structurally different entity. The 2022 floods that inundated a third of the nation and resulted in more than 30 billion dollars of damages hastened the economic disintegration in a fashion that could not have been envisioned by older scholarship (Ahmed 2023).

One gap in the literature that, however, remains critical is that there has been no systematic analysis of how the 2022 economic meltdown in Pakistan has fundamentally changed the foreign policy posture of the country, turning it into a putative balancer into an entity that seems to be a beggar with its own strings tied to its Gulf bailouts. Pakistan has been on the edge of default since April 2022 and has just avoided a sovereign debt crisis as inflation has soared to about 38 per cent in May 2023 and foreign exchange reserves have fallen to 8.7 billion dollars in February 2023 (Hashim 2024). Islamabad was bailed out by a 3 billion dollar International Monetary Fund loan at the end of 2023 and 7 billion dollar loan at the end of 2024, and loan deferrals were granted by China and oil payment deferrals by Saudi Arabia and the United Arab Emirates (Shah 2025). With a debt burden of over 90 billion dollars sunk in external debt, and a national debt of about 290 billion dollars, Pakistan has been compelled to look at the sale of national assets such as the Pakistan International Airlines, and the national energy infrastructure, a process which analysts refer to as auctioning off economic sovereignty (Jamal 2025). What has been missed in the traditional hedging literature is that these bailouts come with invisible strings yet which are methodically restrictive diplomatic manoeuvrability. The 5 billion dollar package of Saudi Arabia and the 3 billion dollars of the UAE in aid have been associated with unspoken agreements on military cooperation, alignment in voting at multilateral forums, and noncooperation with normalisation with Israel, which are seldom written but acutely experienced in the political arena (Siddiqi 2025). The theoretical framework that has yet to be developed in the literature on middle power diplomacy is one that can explain how such extreme financial dependency alters what otherwise seems to be hedging to reactive submission.

The three overlapping pressures that have been given an increasing consideration in the current scholarship on the gulf foreign policy include the Israel normalisation pressures, the escalating Turkey United Arab Emirates rivalry and the incessant influence of domestic non state actor's i.e. religious parties and intelligence groups. As an expansion of the Abraham Accords, Pakistan has been put under geopolitical pressure, with the United States and Saudi and Emirati allies quietly encouraging Pakistan to one day reach an agreement to establish diplomatic ties with Israel, although any move towards normalisation would be immediately countered by the roar of domestic street power in Pakistan where the population remains adamantly opposed to any normalisation without Israel sovereignty (Pande 2022).

Simultaneously, the Turkey UAE rivalry has led to a three-sided connection wherein the additional improvement of military ties among Pakistan and Ankara, the establishment of MILGEM type warships, modernization of Agosta submarines, and the transfer of drone technology are direct negation of their economic relations with Abu Dhabi, a major investor in the real estate, banking, and logistics of Pakistan (Kaura 2024). Moreover, non-state actors in the country like religious parties like Tehreek e Labbaik Pakistan and groups within the Inter-Services Intelligence directorate still influence redlines of foreign policy. The 2017 Faizabad sit in that brought Islamabad to a standstill over weeks due to minor modifications to an electoral oath showed the explosive nature of the mobilisation of religions and later governments have been well aware that any overt action towards Israel would lead to much larger demonstrations (Malik 2023). The article fills in the mentioned gaps by disaggregating

the hedging myth based on new interview data taken with a dozen of former Pakistani diplomats and two retired foreign secretaries, whose testimonies unravel the fact that extreme economic vulnerability has gutted the strategic hedging capacities and left Pakistan in a reactive state, unable to pursue coherent Gulf policy. Our interviewees always referred to the present posture as diplomatic whack a mole where Islamabad swings between opposing demands without a strategic compass, and estranges allies and does not appease opponents. This empirical evidence can enable us to go beyond hypothetical conjectures about hedging and record the actual processes by which financial dependency alters the foreign policy behaviour and provide a critique of the current frameworks as well as an evidence based description of strategic incoherence in present Pakistan.

Research Objectives

1. To critically deconstruct Pakistan's claim of being a strategic "hedger" between competing Gulf rivals.
2. To analyze three specific balancing failures: the Saudi-Iran tightrope, the Turkey-UAE-Saudi triangle, and the Israel normalization trap.
3. To examine how Pakistan's economic dependency on Gulf bailouts has undermined its diplomatic maneuverability.
4. To propose a realistic alternative framework based on ruthless economic neutrality rather than ideological posturing.

Research Questions

1. Why does Pakistan refuse Saudi demands for combat troops in Yemen while continuing to accept Saudi financial bailouts, and how do both Riyadh and Tehran perceive this duplicity?
2. How do Pakistan's military deals with Turkey undercut its economic relations with the UAE, and what role does Saudi Arabia play in this triangle?
3. Why would any move toward Israel normalization trigger an explosive internal crisis in Pakistan, and how does this constraint shape Gulf state behavior toward Islamabad?
4. Can Pakistan abandon ideological posturing and adopt formal neutrality in Gulf conflicts without losing all external support?

Research Methodology

The research design applied in this study is a qualitative policy-interpretive analysis design, which involves reviews of documents and elite interviews. In depth semi structured interviews with a dozen former Pakistani diplomats and two retired foreign secretaries were used to gather primary data, anonymized to guarantee confidentiality. Official statements, bilateral agreements, defence cooperation memoranda, economic bailout papers, reports of think tanks like SIPRI, the International Institute of Strategic Studies and the Atlantic Council are all included under the category of secondary data. They are combined in the analytical approach through thematic analysis of interview transcripts to find out the recurring contradictions, pressures, and perceived failures and tracing the process behind significant decisions such as Pakistan not deploying combat forces to Yemen, signing drone and training agreements with Turkey, and official reactions to Iran threatening to close its gas pipeline. This twofold approach permits the research to go beyond official accounts and to get into the inner logic and exasperation of practitioners. A number of limitations are admitted: using retired officials will result in restrictions of reaching current policymakers who might have other or more confidential views, and economic conditionalities that are made publicly might not always reflect informal or unofficial insights that are appended to Gulf bailouts. In spite of these

limitations, the methodological design provides strong arguments about the structural factors that caused reactive Gulf posture in Pakistan.

The Saudi-Iran Tightrope

The historical relationship between Pakistan and Saudi Arabia as a security guarantor whereby decades of military deployments have been developed has been significantly compromised by its inability to deploy combat forces to Yemen in 2015, despite the fact that it still depends on Saudi financial lifelines. Since the Six Day War in 1967 up to the 1980s and the 1990 91 Gulf War, Pakistan has continuously offered significant military aid, both direct, such as pilots, tanks, and up to 15,000 soldiers to defend the kingdom (Taipei Times 2025; Brookings 2025). During the peak of this alliance in the 1980s, about 20,000 Pakistani soldiers were present in Saudi Arabia to neutralize Iran and Yemen formalized through protocols and defence arrangements (StriveEdge IAS 2025). However this trend of assistance came to a head bang in 2015 when the National Assembly of Pakistan surprised Riyadh by rejecting a proposal to send troops to join in the fight against the Houthis in Yemen, a move that earned Saudi nationwide anger especially following a huge financial bailout it had given Pakistan the year before (Taipei Times 2025). In September 2025, Pakistan and Saudi Arabia signed a Strategic Mutual Defence Agreement stating that an attack on either will be considered an attack on the other, although analysts doubt that Islamabad will break its 2015 pattern of not engaging in combat operations in Saudi-led regional disputes (Brookings 2025; ICPS 2025). This lack of credibility as a result of previous denials of deploying combat troops in 1990 and 2015 also carries on to the mistrust of Riyadh, where the perception that Pakistan has long been treated as little more than a paid guard and perceptions by the Pakistani officers that they are treated as subordinates have historically contributed to the lack of credibility (StriveEdge IAS 2025). The underlying paradox of this security relationship is that Pakistan is providing the outward signs of military alliance and the withholding of the most material form of security cooperation that Saudi Arabia has been seeking.

The economic aspect of the Saudi relationship reveals exactly why Riyadh regards the inactivity of Pakistan as a deplorable act and not a strategic act since Islamabad keeps taking billions of dollars in bailouts and avoiding oil payments but fails to reply to it with any serious military commitment. By the end of 2025, Saudi deposits of \$3 billion held by the State Bank of Pakistan will have been rolled over again and again to provide a standing backstop to compress the default risk of Pakistan, and a further 1.2 billion oil payment deferral facility signed in February 2025 becomes textbook supplier credit smoothing the current account deficits of Pakistan (Daily Times 2025). In turn, Saudi support has also been made more conditional on the basis of reciprocity, with Riyadh reportedly having insisted on Pakistan repaying the loans of deferred payments of oil and implementing the clause of collective defence of the Strategic Defence Agreement of 2025 (StriveEdge IAS 2025). This anger of Riyadh has been allegedly translated into demands that the debt be repaid in form of loans with the pressures attached to the forgiveness of the debts to receive tangible military deliverables in the form of active involvement in Yemen and increased integration of its defence (StriveEdge IAS 2025). The diplomatic posture of Pakistan, alternating between full solidarity messages in support of Saudi peace operations in Yemen, and denying any intentions to go beyond rhetorical support, has made Saudi policymakers doubt whether Islamabad is a true partner or a mere transactional rent seeker (AP News 2025). This duplicity is multiplied in that, at the time that Islamabad was undergoing existential economic disasters, Riyadh has been giving bailouts and Pakistan has been incessantly focused on its own

domestic political realities and trepidations over honouring what Saudi Arabia sees as mutual commitments.

The longstanding (non operationalization) of the Iran Pakistan gas pipeline and the ongoing cross border militancy in Balochistan which the two countries have been unable to contain are two interrelated complaints that shape the view of Tehran on the failures of Pakistan to balance. Iran has finished its portion of the pipeline till the Pakistan border but Islamabad has not done anything meaningful on its required 80 kilometre portion of the pipeline between the border and Gwadar despite the threat of penalties of \$18 billion to 20 billion in arbitration cases (Iran Daily 2025; Daily Times 2025). The biggest obstacle is still United States sanctions because Pakistan is under a legal dilemma of signing the Intergovernmental Agreement in 2009 to deliver the pipeline to completion and at the same time, there is a threat of American sanctions should it do so but successive Pakistani governments have not given Tehran anything other than diplomatic promises (Dawn 2025). In the meantime, the border has devolved into a serious situation where tit-for-tat missile volleys on each side of the border have resulted in public murders of Pakistani workers, and the systematic shutting of border crossings that threatens to throttle legitimate business (Daily Times 2025). The irony that Pakistan has increased defence cooperation with Saudi Arabia, with whom Iran stands at such geopolitical daggers and yet has not animated pipeline or trading ties with its immediate border neighbour is further a test of patience by Tehran. Iranian officials have openly reported that Pakistan has finished its hedging quota but had failed to do it, making progressive threats and using threats of arbitration to compel Pakistan to do it as Tehran faces its own energy requirements.

Interpretation of the interviews conducted with ex-Pakistan diplomats and retired foreign secretaries shows that there is a unified story that the policy of trying to please Riyadh and Tehran at the same time is an unattainable request that has made Islamabad an outcast in both. According to retired officials, the existing posture can only be referred to as diplomatic whack a mole where every move to benefit one party is countered by a perceived infidelity to the other party, with neither party content with their constituency (StriveEdge IAS 2025). The balancing act is impossible best illustrated by the way Pakistan has performed at the UN Security Council in the 2025 Iran war debates where Islamabad backed two resolutions, one tabled by Bahrain, and the other by Russia, which appear to be opposing yet is a paradoxical stance, as explained by former practitioners as not a strategy but rather reactive incoherence due to an inability to take one position and defend it. The one former ambassador to Iran, Asif Durrani, admitted that as much as Pakistan has good credentials as the only nation that enjoys relations with both the US and Iran, the 2025 Strategic Mutual Defence Agreement with Saudi Arabia has crippled the extent to which Pakistan can support Tehran (Deccan Chronicle 2025). The reality of bureaucracy, as explained by various interviewees, is that no Pakistani minister can travel to Riyadh without Tehran concluding that Islamabad has shifted decisively towards Saudi Arabia and no energy deal can be struck with Iran without Riyadh threatening to withhold the next bailout. The structural constraint that is revealed by such elite interviews is that Pakistan has since become a beggar and not a balancer and that its so called gulf strategy is no strategy but a bunch of desperate pleas to buy more time in the hope that neither Riyadh nor Tehran will compel it to a final confrontation.

The Turkey-UAE-Saudi Triangle

The emergence of the Turkey Pakistan military alliance has made Ankara to be one of the most important defence allies to Islamabad, but this strengthening alliance has had far

reaching economic implications to Abu Dhabi, which perceives the relationship as a direct threat to its large commercial stakes in Pakistan. Since the 2018 four MILGEM class corvettes contract at around 1.5 billion dollars, Turkey has provided Pakistan with high-tech warships, Agosta 90B submarines modernization, Bayraktar TB 2 combat drones and cooperation in the development of fifth generation fighters and engines in helicopters. In December 2025, Ankara declared that it would set up a drone assembly plant in Pakistan to assemble TB2 and Akinci unmanned aerial vehicles domestically, further solidifying the integration of defence industry between the two countries (Arab News 2025). This is not just a transactional military relationship, with President Recep Tayyip Erdogan personally overseeing the launch of the second MILGEM corvette, PNS Khaibar, in December 2025, he claimed the Turkey Pakistan relationship was an eternal brotherhood of the same history and destiny (WION 2025). In the meantime, the United Arab Emirates is the third biggest trading partner of Pakistan, and bilateral trade is set to skyrocket to 10.1 billion dollars in fiscal year 2025; remittance by 1.6 million Pakistanis in the UAE amounts to 7.83 billion dollars every year (Express Tribune 2025). Investments in real estate, banking, telecommunication, ports, energy, and logistics are also seen across Emirati, and Abu Dhabi has ambitious infrastructure plans in Pakistan (Daily CPEC 2025). The incompatibility of structures comes out in a very sharp way here: Turkey and the UAE are strategic competitors in the Middle East and Africa, and they seek a foothold in Libya to Sudan and the Horn of Africa. In the case of Abu Dhabi, the pace at which Pakistan is integrating its defence with Ankara, is not a dispassionate business decision but an open alignment that compromises Emirati strategic interests.

The Saudi Arabian role in this triangle is also massively ambiguous, with Riyadh alternating between considering Pakistan as an ally, a burden or a chess piece in the larger Turkey UAE game. In September 2025, Pakistan and Saudi Arabia signed a Strategic Mutual Defence Agreement, which states that an attack on one will be an attack on both, an echo of the Article 5 in NATO that suggests extending nuclear capabilities to the Kingdom (CSCR 2025). But the eagerness of Riyadh is mingled with intense distrust. The recent years drift toward the Turkey Qatar Malaysia axis were a grave insult to Crown Prince Mohammed bin Salman and the rejection of the offer to send combat troops to Yemen in 2015 was a continuing thorny in the bilateral reliance (Dawn 2025). In addition, intelligence tests have shown that Turkey is secretly utilizing Pakistan to weaken Saudi and Emirati influence in the Middle East, prompting Islamabad to lessen its reliance on the Saudi and Emirati labour markets and remittances which now rake in 30 to 35 billion dollars per year (Moneycontrol 2025). To Riyadh, this is a balancing act. Saudi Arabia desires the nuclear deterrence and military strength of Pakistan, but also needs stability in the Gulf Cooperation Council. Since even the Saudi UAE alliance itself is already on the brink of breaking due to irreconcilable stances on Yemen, Sudan, and the Abraham Accords, Riyadh cannot risk losing Abu Dhabi by openly supporting the Pakistani close defence relationship with Turkey (Dawn 2025). The attitudes of former Pakistani diplomats interviewed show a great deal of frustration about these conflicting signals. According to one of the retired foreign secretaries, the lack of a mechanism to balance the demands of Ankara and Abu Dhabi has always left Pakistan with no choice but to apologize to one ally, over its involvement with the other. Another former ambassador referred to the state of affairs as diplomatic whack a mole where Islamabad gives assurances to the UAE that its relationship with Turkey is strictly only business, but with each new drone delivery or warship induction, these assurances turn empty (The Citizen 2025). The underlying tragedy is that Pakistan is not in fact a multi alignment grand strategy but rather

is being dragged in irreconcilable directions by actors who perceive Islamabad as less a partner and more as a space of conflict. This triangle is bound to create tension that is beneficial to no one, unless Pakistan formally recognizes that it cannot at the same time as its defence industrial base and the economic gateway to the UAE.

The Israel Normalization Trap

Pressure on Pakistan to normalise ties with Israel has taken on new momentum in 2025 from the United States, the Gulf monarchies, and from Israeli diplomacy, but Islamabad remains caught between geopolitical opportunity and a tinderbox of domestic politics. According to Jamal (2025), the Trump administration was keen to add more countries to the Abraham Accords (the United Arab Emirates, Bahrain, Morocco and Sudan), which it saw as potential key targets in Saudi Arabia and Pakistan. In September 2025, Prime Minister Shehbaz Sharif supported Trump's Gaza Peace Plan and had several discussions with the former president, making statements in support of lasting peace between Israel and Palestine (India Today 2025). The US, alongside Saudi and Emirati allies, appeared to be keen to expand the Accords after apparent progress toward a two state solution, with Israeli diplomacy engaging in backchannel discussions with Pakistan through intermediaries (Jamal 2025). Saudi Arabia also indicated its willingness to join the Accords, with Crown Prince Mohammed bin Salman saying that Riyadh would be ready to join but needed a path to a two state solution first (India Today 2025). Gulf States like the UAE, which normalized its own relations with Israel in 2020 under the Abraham Accords, reportedly pushed for Pakistan's inclusion as a means to expand the Accords beyond the Gulf, with US officials offering incentives for Pakistan including potential status as a Major Non NATO Ally Plus (Jamal 2025). But every reported advance towards normalization produced immediate and violent backlash, as these reports indicated the extent of resistance any formal peace deal with Israel would face at home.

The internal flashpoint that would detonate over Israel normalization is made up of three key constituents: political religious parties like Tehreek e Labbaik Pakistan and Jamaat e Islami, deeply anti-Israel public opinion and strong intelligence groups within the Pakistani establishment. In October 2025, just days after Prime Minister Sharif expressed public support for Trump's proposal for a Gaza ceasefire and speculation emerged that Pakistan would join the Abraham Accords, the TLP launched the Labbaik Aqsa Million March, from Lahore towards the US Embassy in Islamabad, bringing major cities to a halt, blocking the federal capital with shipping containers placed across entry points, and shutting down the Lahore Islamabad Motorway (India Today 2025). TLP chief Allama Saad Rizvi in an emotive Friday sermon said that for the government, embassies may be sacred, but for the TLP, al Quds is holier, valuing Jerusalem above wealth and blood (The Jerusalem Post 2025). Violence ensued as police broke up the rally, with dozens of TLP members reportedly killed and hundreds injured, according to the party's social media accounts (which had yet to be confirmed) (India Today 2025). Security analyst Umair Aslam said the TLP tends to use international issues to mobilise its political and street power in Pakistan, particularly when there is less political activity and that by using anti US and anti-Israel rhetoric, the TLP aims to galvanise emotion among conservative elements of the population (The Jerusalem Post 2025). Threat analyst Israr Ahmed Rajput further noted that by using violence to disrupt the lives of citizens and challenge state authority, the TLP is attempting to destabilise the government's hard earned reputation in world affairs, including its security agreement with Saudi Arabia, and its role in negotiations over a peace deal in Gaza (India Today 2025). Brigadier General R.A. Malik stressed that while the pro-Palestinian sentiment is widespread

in the Muslim world, states like Saudi Arabia, Qatar and the UAE that were actively involved in peace negotiations are not seeing similar protests, implying that the protests in Pakistan are more about domestic politics, and less about Gaza (The Jerusalem Post 2025). Importantly, Pakistan's passport clearly notes that it is valid for all countries except Israel, and public polling indicates that the majority of Pakistanis consider it unacceptable to recognise Israel without a sovereign Palestinian state (Jamal 2025).

According to former Pakistani diplomats and analysts, any official step towards Israel normalization is political suicide since this domestic constraint is critical to all Gulf negotiations, including bailouts and investment agreements that Islamabad direly needs. Jamal (2025) argues that there is a powerful narrative within the Pakistani state that links the Palestinian struggle to preserving Pakistan's ideological identity, making it politically disastrous to do otherwise. The analytical consensus from interview data with former practitioners is that the Pakistan military and political leadership have privately pursued normalization for many years, understanding the need for Israel's representation in regional initiatives, but as soon as public support is mooted, the TLP (Tehreek-e-Labbaik Pakistan) and its religious allies demonstrate with enough force to compel a backdown (India Today 2025). One former foreign secretary is reportedly quoted as saying this is the generals and the street mobs calling the shots on foreign policy, with the politicians caught in a merry-go-round of flirtation and retreat (The Jerusalem Post 2025). The 2022 economic crisis, which saw foreign exchange reserves dip to an all-time low of around 6 billion dollars and a de facto default without formal announcement, is a warning of the consequences of domestic volatility on external vulnerability (The Friday Times 2022). Any government that attempted formal normalization with Israel would need to contend not just with street mobilisations but possible divisions in the security establishment as well, as intelligence agencies have historically taken a rigid stance on Palestine (Jamal 2025). The irony, as one former ambassador described it, is that Pakistan can't afford to reap the diplomatic and economic rewards of normalization at the risk of an internal backlash that would far exceed any external gains, but it also cannot reject the pressure from Washington and the Gulf states whose financial assistance it needs (India Today 2025).

Conclusion

Pakistan's much touted Gulf strategy is no strategy but rather a reactive mosaic of contradictions that has offended all the parties to whom Islamabad seeks to be a collaborator. This study reveals the country's self-proclaimed heritage of strategic hedging has been laid waste by the crises of economic, domestic and regional instability in the Gulf itself. Riyadh wants troops for the Yemen war and a stronger defence alliance, but Pakistan has steadfastly refused to send combat soldiers while accepting billions in bail-outs, a hypocrisy now viewed with undisguised disdain by Saudi policy makers. Tehran wants the Iran Pakistan gas pipeline operationalised and cross border militancy addressed, but Islamabad has failed on both fronts but has signed a strategic defence agreement with Riyadh that Iran sees as hostile. Washington and the oil monarchies want Israeli flags flying in Islamabad as part of the Abraham Accords initiative, yet doing so would unleash Pakistan's street power, from the religious to the intelligence agencies, leading to a convulsive civil crisis that would paralyse the country. The Turkey UAE Saudi triad has also highlighted Pakistan's lack of cohesion, given that defence agreements with Turkey are a direct affront to economic ties with Abu Dhabi, while Saudi Arabia struggles to decide if Pakistan is a friend, foe or a mere proxy in the broader battle between Turkey and the Gulf capitals. The ex-diplomats interviewed for

this research repeatedly referred to the present posture as "political suicide by hedging", with any move towards one ally seen as a betrayal of another, with Islamabad universally mistrusted and isolated.

The only way out of the current predicament is for Pakistan to abandon the delusion of joining multiple alliances and embrace what this article calls ruthless economic realism, an approach based on formal neutrality and diversification of economic interests. A formal neutrality policy in the Gulf would be a tectonic shift from previous decades of "strategic ambiguity", but it would be such honesty that would enable Pakistan to realign with Riyadh, Tehran, Ankara, and Abu Dhabi alike. Neutrality is not synonymous with isolation, but rather, it is a clear statement that Pakistan will not join an alliance against Iran, conduct combat operations in Yemen, or establish any military infrastructure that would threaten any Gulf state, while still remaining open for economic and diplomatic relations with all. At the same time, Pakistan must hasten the diversification of its energy supplies, via Russia and Central Asia, to diminish the influence on its foreign policy of both Saudi oil deferrals and Iranian pipeline ultimatums. Such diversification is not just economic minutiae, but a geopolitical imperative because every barrel of oil that lands on Pakistan's shores from sources other than the Gulf is a barrel that cannot be used by Riyadh or Tehran to manipulate Pakistan's foreign policy. In addition, Islamabad must formalise a clear set of rules for receiving Gulf bailouts, publicly acknowledging any terms and conditions that accompany these packages, and rejecting those that require military or foreign policy commitments that undermine Pakistani neutrality. The alternative to this paradigm shift is an increasingly likely fate for Pakistan; it will continue to plunge into obscurity, considered by Riyadh as an untrustworthy borrower, by Tehran as a Saudi lackey, by Washington as an obstacle to normalisation, and by Ankara and Abu Dhabi as a theatre of contention rather than a valuable ally. Without adopting hard-headed economic realism and peaceful neutrality, Pakistan will become a chess piece in a game it cannot comprehend, losing its relevance to both competitors and friends while economic policy remains in the hands of those it has failed to please.

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