



## ASIA-PACIFIC LEADERSHIP NETWORK

### PAPER PROMISES: THE LIMITS OF PAKISTAN'S DEFENCE GUARANTEE TO SAUDI ARABIA

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#### Introduction

The September 2025 announcement of a “[Strategic Mutual Defense Agreement](#)” (SMDA) between Pakistan and Saudi Arabia revived old [anxieties](#) about an [Islamic bomb](#) being placed at Riyadh’s disposal. These fears are not new. Since the late 1970s, speculation about Pakistan providing Saudi Arabia with nuclear capabilities has recurred with every uptick in bilateral defense cooperation.

Yet, alarmism risks missing the central point: this agreement is far more [a political](#) signal than an operational transformation. It offers both governments symbolic reassurance in a volatile moment but falls far short of constituting a credible nuclear umbrella. Understanding why requires two lenses often missing in policy commentary: the theory of extended deterrence and the legal architecture of nuclear governance. Both lenses highlight why Pakistan cannot, and is unlikely to, extend nuclear deterrence to Saudi Arabia in any meaningful sense.

This commentary unpacks the defence pact along three lines. First, it draws on deterrence theory to explain what is required for states to credibly extend deterrence and why Pakistan does not meet these requirements. Second, it examines the international legal and nonproliferation constraints that would make any Pakistani nuclear guarantee controversial and potentially illegal. Third, it situates the pact in the broader politics of US-Saudi relations, Gulf insecurity, Pakistan’s domestic imperatives, and nuclear governance, and explains why this pact is more symbolic than anything else.

#### Extended Deterrence and Its Requirements

Extended deterrence refers to a state’s ability and willingness to use its capabilities, often nuclear weapons, to defend an ally against attack. The Cold War produced rich literature on what makes such [deterrence credible](#), which translates to: the [capability](#) to project

power on behalf of an ally, the interests at stake that make defending the ally plausible, and the credibility of commitments through [signaling](#) and alliance structures.

Applied to NATO, these principles worked because the United States stationed forces in Europe and institutionalized [defense commitments](#) through Article 5. Through these measures, the United States tied its own security directly to the defense of its [allies](#). US [external deterrence](#) depended on clear signals of willingness and the [perception](#) that its own security was bound up with that of its allies. However, US policymakers confronted a dilemma: would Washington be willing to risk New York or Washington, D.C., to protect Paris or Berlin? Instead of abstract promises, the credibility of US extended deterrence required the [forward deployment](#) of nuclear forces in [Europe](#), integrated command structures, and visible [exercises](#) that demonstrated [readiness](#).

By these standards, Pakistan is ill-suited to provide nuclear deterrence to Saudi Arabia. Geography alone complicates the picture: Pakistan lacks permanent forces in the Gulf and does not share borders or direct theaters of conflict with Saudi Arabia. Command and control arrangements are absent. Pakistan lacks integrated planning, a shared military (let alone nuclear) doctrine, and an institutional mechanism comparable to NATO's Nuclear Planning Group; and the SMDA offers no foundation for a NATO-style collective security framework or even a credible joint deterrence architecture. Moreover, Pakistan's [nuclear posture](#) has always been India-centric and designed for deterrence by denial. Pakistan has not used its nuclear weapons capability for power projection thousands of miles away. The corollary from the Cold War dilemma is: Would Pakistan ever risk nuclear retaliation from India and Israel to defend Saudi territory against a hostile state?

While Pakistan depends on Saudi Arabia financially, this economic dependence is not equivalent to the existential stakes that bound the United States to Western Europe during the Cold War. More importantly, neither Riyadh nor Islamabad has shared any details regarding the application of the defense pact, nor have they taken any steps toward establishing joint commands or deploying any visible deterrents. [Official communication](#) regarding the SMDA has been vague, building on the longstanding relations between the two countries. The [agreement](#) “aims to develop aspects of defense cooperation between the two countries and strengthen joint deterrence against any aggression. The agreement states that any aggression against either country shall be considered an aggression against both.” This statement on its own raises questions about the threat perception of the two countries and the specter of a common enemy.

### **The Legal and Normative Constraints**

[Articles I and II](#) of the Nuclear Non-Proliferation Treaty (NPT) prohibit the transfer of nuclear weapons and related weapon technologies and materials between state parties. Any arrangement resembling nuclear sharing in which Saudi Arabia, a signatory since 1988 and a designated non-nuclear weapon state, could be viewed as benefiting from non-signatory Pakistan's nuclear deterrence and is certain to provoke international censure.

There is, however, a precedent of nuclear sharing in the stationing of US nuclear weapons in Europe. It was, however, politically tolerated during the Cold War and thereafter as a matter of alliance practice and strategic necessity, although its [legality](#) has always been [contested](#) and it [undermined](#) the objective and spirit of NPT. In the US case, its political, economic and normative legitimacy clearly prevailed over legal legitimacy. Pakistan lacks this legitimacy. At best, it is a regional power with a restricted sphere of influence. A Pakistan-Saudi extended nuclear deterrence arrangement would not be read as a continuity of international nonproliferation norms. Rather, it would be interpreted as a defiance and flouting of nonproliferation norms by Pakistan and a breach of nonproliferation commitments by Saudi Arabia.

When NPT parties have been judged to pursue illicit nuclear activities, responses have ranged from [Chapter VII UNSC resolutions](#), [counterproliferation measures](#), [kinetic warfare](#) by a coalition of largely Western like-minded countries, and, recently, [air strikes](#) against IAEA safeguarded nuclear facilities. The mix of diplomatic, economic and military responses underscores that any credible arrangement interpreted as nuclear sharing between Pakistan and Saudi Arabia would risk triggering both diplomatic punishments and punitive measures already used against proliferation challenges. Pakistan has long faced proliferation-related penalties, from the 1989 Pressler Amendment sanctions and the 1998 post-test restrictions, underscoring its continued vulnerability, to economic and diplomatic costs tied to its strategic programs.

### **The Politics of Symbolism**

Why, then, announce such a pact? The timing provides the answers. For Saudi Arabia, the agreement follows regional tremors: Israel's [expanded war](#), the [controversial strike](#) on Doha, and rising [Houthi missile capabilities](#). The United States has long shaped the regional security architecture in the West Asia. Its curious silence over the SMDA and cautiously [positive analytical pieces](#) from US-based analysts signal that Riyadh's reliance on Islamabad is in line with Washington's game plan for the region, which includes [the extension of the Abraham Accords](#). However, Riyadh's overreliance on symbolic guarantees could mask real capability gaps in its military power.

For Pakistan, the pact delivers immediate political dividends. Amid economic fragility and contested governance, it projects international relevance while renewing crucial Saudi [financial](#) lifelines. Domestically, it reinforces the military-backed regime's legitimacy by showcasing Pakistan as a pivotal security partner in the Gulf.

Yet these gains carry significant risks. Greater entanglement in Gulf rivalries could complicate Pakistan's delicate regional balancing, particularly by straining its ties with Iran. Pakistani decision-makers must weigh whether short-term incentives (like financial relief and symbolic prestige) justify the potential strategic costs. Notably, Tehran has responded with a surprising [overture](#): signaling interest in joining the SMDA alongside

Iraq. This gesture complicates the simplistic framing of the pact as an anti-Iran bloc and suggests instead that its meaning and consequences remain contested and fluid.

### Lingering Questions

Questions remain regarding the operationalization of the SMDA. Pakistan's 2015 [refusal](#) to join the Saudi-led war in Yemen is a reminder that rhetorical commitments do not automatically translate into deployments. Saudi Arabia, for its part, is unlikely to [intervene](#) militarily if Pakistan faces escalation with India. The asymmetry reveals the pact's essence: it is a flexible, symbolic commitment designed to buy reassurance. It would be folly to interpret this as a rigid military guarantee. Similarly, interpreting the SMDA through the Cold War-lens as evidence of an imminent [nuclear umbrella](#) fuels outdated Islamic Bomb tropes and risks complicating the [security dynamics](#) of South-West Asia, all while failing to acknowledge the practical and legal limitations involved.

The SMDA also does not signal a shift in the nuclear order. Since the nuclear black market affair two decades ago, Pakistan has been obsessed with [rebuilding](#) its image as a [responsible nuclear power](#). It has implemented [legislative and regulatory](#) measures to establish an extensive nuclear command and control system and an export control regime. It has religiously adhered to the international nuclear nonproliferation regime and unilaterally [undertook](#) an obligation to comply with Articles 1, 2, and 3 of the NPT to strengthen its nonproliferation credentials for the Nuclear Suppliers Group (NSG)-membership. The Biden-Administration's [sanctions](#) in 2024 put a huge dent in Pakistan's nuclear image. Drawing the linkage of the SMDA to the nuclear umbrella would imply that Pakistan has decided on a collision course with the United States when all evidence suggests otherwise. While this does not mean that the sanctioned entities would be off the trigger list any time soon, it also does not imply that Pakistan is going to unravel decades of US security presence by stationing nuclear-armed missiles in a volatile West Asia.

### Conclusion

The Saudi-Pakistan SMDA can be best understood as politically expedient but strategically hollow. Extended deterrence theory shows why Pakistan lacks the capability, credibility, and alignment of interests to provide a nuclear umbrella. International norms and law underscore that any attempt to do so would be prohibitively costly. That leaves symbolism: reassurance for Riyadh, domestic legitimacy for Islamabad, and a carefully calibrated signal that preserves the existing US-anchored security architecture in West Asia.

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