

Gulf Cooperation Council's Emerging Geopolitical Role and its Implications for India

Moksha Sharma*

Ph.D Scholar, University of Jammu.

*Corresponding Author: mokshasharmaa@gmail.com

Abstract

The Gulf Cooperation Council (GCC) has undergone a profound structural transformation over the past few decades. It has systematically diversified its influence, transcending its original oil-centric foundation to emerge as a cohesive geopolitical force with economic, military, and foreign policy ambitions. This paper evaluates the GCC's emerging geopolitical role and examines its implications for India, a rising power with deep economic, demographic, and security linkages to the West Asian region. The analysis situates GCC's strategic evolution within shifts in global energy markets, diversified economic visions (such as Saudi Arabia's Vision 2030 and UAE's Vision 2050), regional realignments, and emerging maritime connectivity frameworks. The GCC expanding geopolitical role presents India with both significant strategic opportunities and complex challenges. For India, the GCC's new role offers critical avenues for enhanced energy security, significant capital investment for infrastructure, and collaboration on major connectivity projects like the India-Middle East-Europe Economic Corridor (IMEC). It argues that India's foreign policy must move beyond transactional energy diplomacy to a comprehensive West Asia strategy that institutionalizes India-GCC engagement across trade, technology, diaspora, maritime security, defence, and multilateral cooperation. The GCC's pursuit of strategic autonomy amid a multipolar world mirrors India's own foreign policy approach. This convergence enables pragmatic partnerships that are less alliance-driven and more issue-based, allowing India and the GCC to cooperate flexibly across competing global power structures.

Keywords: Gulf Cooperation Council, India, Geopolitical Alignment, West Asia.

Introduction

The geopolitical landscape of West Asia has undergone a profound transformation in the early twenty-first century, elevating the GCC from a regional bloc principally concerned with collective security and economic coordination to an increasingly influential actor in global politics. Once primarily a forum for intra-Gulf cooperation, the GCC has evolved over the past two decades into a platform for its most powerful members particularly Saudi Arabia, the UAE, and Qatar to actively shape regional security, global energy markets, and international diplomacy. Driven by strategic visions of economic diversification, increasingly proactive foreign policies, and shifting patterns of great-power competition, GCC states are expanding their geopolitical footprint across multiple domains. For India, a country with deep historical, economic, and strategic linkages to the Gulf, this shift holds profound implications. Traditionally anchored in energy dependencies and labour mobility, India-GCC engagement has expanded to encompass comprehensive strategic partnerships, defence cooperation, and multidimensional collaboration in areas such as food and energy security, technology, climate initiatives,

*Copyright © 2026 by Author's and Licensed by Inspira. This is an open access article distributed under the Creative Commons Attribution License which permits unrestricted use, distribution, and reproduction in any medium, provided the original work properly cited.

*A Special Issue for the papers accepted for publication in the International Multidisciplinary Conference on India's Foreign Policy and International Relations: A Future Roadmap (IFPIR-2026) (Hybrid Mode) (22-24 January 2026) Organized by Geo-Politics & Defence Study Research Cell, Faculty of Arts, Education and Social Sciences, Jai Narain Vyas University, Jodhpur, Rajasthan.

and regional connectivity frameworks.¹ As both regions navigate a changing global order defined by multipolarity, economic realignment, and shifting security imperatives, the GCC's emerging role presents new opportunities as well as challenges for India's foreign policy calculus.

This paper examines the evolving geopolitical role of the GCC and analyses its implications for India's strategic, economic, and security interests. It explores how the internal transformations of the GCC, its external partnerships, and its shifting policy orientations are reshaping India–GCC relations. This research argues that the GCC's expanding ambitions shaped by economic diversification, technological modernization, and the pursuit of strategic autonomy necessitate a recalibration of India's engagement beyond conventional energy-centric and diaspora-focused frameworks. It underscores the imperative for a comprehensive strategic partnership attuned to the complexities of contemporary geopolitics.

Research Objectives

- To examine the evolving geopolitical role of the GCC in regional and global affairs, with particular emphasis on its strategic, economic, and security dimensions within a multipolar international system.
- To analyze the changing nature of India–GCC relations across political, economic, energy, and security domains, and to assess how shifts in GCC strategic priorities shape India's foreign policy orientation toward West Asia.
- To identify and evaluate the strategic opportunities and challenges for India arising from the GCC's growing influence in global diplomacy, international institutions, and emerging domains such as connectivity, maritime security, and technological cooperation.

Review of Literature

The transformation of the GCC into an influential geopolitical actor has attracted growing scholarly attention across the fields of international relations, energy studies, and strategic affairs. Early academic literature largely conceptualized the GCC as a regional organization primarily concerned with collective security, regime survival, and coordination among conservative monarchies. Scholars such as Michael Barnett and F. Gregory Gause argued that the GCC functioned less as a deeply integrated political bloc and more as a security alliance shaped by shared threat perceptions arising from the Iranian Revolution and the Iran–Iraq War.² This strand of scholarship emphasized internal cohesion, monarchical legitimacy, and the GCC's reliance on external security guarantees, particularly from the United States. Subsequent studies began to highlight the role of economic resources and oil wealth in shaping the GCC's regional influence. Kristian Coates Ulrichsen examined how state-led development models, sovereign wealth, and financial leverage enabled GCC states to project power beyond their immediate neighbourhood. During the Arab Spring, these geo-economic instruments were deployed through financial aid, mediation, and selective intervention, underscoring the linkage between economic capacity and geopolitical ambition.³ This literature marked an important shift from viewing the GCC as a reactive security bloc to recognizing its growing capacity for regional and extra-regional influence.

A significant body of contemporary scholarship focuses on the increasingly activist foreign policies of individual GCC states. David Roberts and Mehran Kamrava highlight Qatar's assertive diplomacy, mediation initiatives, and soft-power strategies.⁴ Similarly, study by scholar Christina Boswell examine the United Arab Emirates' interventionist posture, military modernization, and strategic expansion across the West Asia, Red Sea, and Horn of Africa⁵. Research on Saudi Arabia, particularly by Bernard Haykel and Thomas Lippman, underscores its re-emergence as a central geopolitical actor following the launch of Vision 2030, which has recalibrated both its economic model and foreign policy priorities⁶. Collectively, this literature points to a broader transformation within the GCC from rentier-state passivity toward proactive, globally engaged, and strategically ambitious leaderships.

Another important strand of literature examines the GCC's ongoing economic transformation and its implications for global geopolitics. Scholars analyse diversification strategies, sovereign wealth fund activism, technological investments, and efforts to transition toward post-oil economies. This economic reorientation is increasingly linked to foreign policy behaviour, as GCC states seek new partnerships, markets, and strategic relevance beyond hydrocarbons. In this context, F. Gregory Gause and Lina Kinninmont argue that a multipolar international order has expanded the strategic space available to GCC states, enabling them to pursue hedging strategies by balancing relations with the United States, China, Russia, India and other emerging powers.⁷ Such analyses emphasize the GCC's

pursuit of strategic autonomy rather than alignment within rigid alliance structures. Literature on India–GCC relations reflects deep historical, economic, and social linkages, particularly in the domains of energy trade, labour migration, and remittances. Earlier studies focused predominantly on India's energy dependence on Gulf hydrocarbons and the central role of Indian migrant workers in GCC economies. However, more recent scholarship notes a gradual evolution in India's engagement with the region toward broader political, economic, and strategic cooperation. Scholars such as N. Janardhan, Harsh V. Pant and Joshi highlight the expansion of defence ties with key Gulf states, especially the UAE and Saudi Arabia, alongside growing cooperation in maritime security, counterterrorism, and diaspora diplomacy in the Indian Ocean region.⁸ This literature also examines how GCC economic diversification strategies are reshaping India's labour markets, investment flows, and trade patterns. Research analyst C. Raja Mohan argue that India–GCC relations are increasingly shaped by new geopolitical configurations, including the Abraham Accords, the Iran–Saudi rapprochement, and India's participation in minilateral frameworks such as I2U2.⁹ At the same time, several studies highlight the strategic challenges posed by China's expanding economic and security footprint in the Gulf, raising concerns for India's long-term strategic autonomy and influence in West Asia. These analyses situate India–GCC relations within a broader Indo-Pacific and multipolar context, underscoring the growing strategic salience of the Gulf for India's foreign policy.

Overall, existing literature underscores the GCC's evolution from a largely regional grouping into an emerging global influencer driven by economic reform, diplomatic diversification, and strategic recalibration. However, while many studies analyse India–GCC relations through discrete economic, energy, or security lenses, relatively few integrate these dimensions within a comprehensive geopolitical framework that systematically links the GCC's evolving role to India's strategic calculus. This research seeks to address that gap by synthesizing regional and bilateral analyses to assess how the GCC's emerging geopolitical role reshapes India's strategic, economic, and security interests in an increasingly multipolar world.

The GCC's Evolving Geopolitical Architecture

The GCC occupies a strategically critical position along some of the world's most vital maritime chokepoints, notably the Strait of Hormuz and the Bab-el-Mandeb, through which a substantial proportion of global oil and liquefied natural gas shipments transit. This geographic centrality places GCC states at the intersection of global energy flows and international trade networks. As Indo-Pacific trade volumes expand, the strategic importance of Gulf maritime infrastructure including ports, and logistics corridors has increased correspondingly, particularly for major trading states such as India. The GCC's gradual emergence as a connectivity hub linking Asia, Africa, and Europe has positioned the region as a key node in the evolving geography of global commerce. From a theoretical perspective, the GCC's evolving geopolitical architecture can be understood through the lenses of geo-economics and regional power transition. A defining feature of this transformation has been the strategic shift toward diversified, knowledge-based economies as instruments of state power. All six GCC member states have articulated long-term national development strategies most prominently Saudi Arabia's Vision 2030, the UAE's Vision 2050, and Qatar's National Vision 2030, alongside comparable frameworks in Kuwait, Bahrain, and Oman aimed at reducing structural dependence on hydrocarbons.¹⁰ These strategies prioritize sectors such as tourism, financial services, logistics, renewable energy, advanced manufacturing, and the digital economy, reflecting a deliberate effort to deploy economic restructuring as a means of enhancing geopolitical resilience and international leverage.

Drawing on geo-economic theory, diversification in the GCC represents not merely an economic adjustment but a mechanism for preserving influence within a transforming global order. Long-term uncertainty over fossil fuel demand amid global decarbonization has weakened the strategic centrality of hydrocarbons, compelling Gulf states to convert accumulated oil wealth into more sustainable sources of economic and political power. Demographic pressures and rising domestic expectations have further reinforced the recognition that traditional rentier-state models are insufficient for long-term stability. In this context, positioning GCC states as global economic hubs constitutes a strategy of power conversion, whereby material resources are transformed into structural and institutional influence. The UAE's evolution into a logistics, financial, and technology hub exemplifies this logic, demonstrating how integration into global value chains enhances both economic competitiveness and diplomatic relevance. Saudi Arabia's investments in renewable energy, infrastructure, and transnational logistics corridors similarly reflect an effort to reconstitute its geopolitical role beyond oil-centric influence. These geo-

economic transformations have been accompanied by a parallel shift toward greater strategic autonomy in foreign policy behaviour. A discernible trend within GCC foreign policy is the pursuit of strategic autonomy, marked by a move away from exclusive dependence on external security architectures. This shift has led to more independent and assertive diplomacy, though its form varies by member. Qatar exemplifies this trend, by acting as a mediation power in conflicts such as Afghanistan, Lebanon, and Gaza.¹¹ Saudi Arabia's repositioning as a regional mediator, including diplomatic engagement with Iran and the expansion of strategic ties with China, reflects a hedging strategy consistent with middle-power behaviour in a multipolar international system. The UAE's expansion of port and logistics investments across the Red Sea, East Africa, and the Mediterranean can be interpreted through a network power framework, wherein control over critical infrastructure enhances both economic reach and strategic influence. Collectively, these developments point to the emergence of a more autonomous and multidimensional GCC geopolitical posture. Rather than functioning solely as security-dependent rentier states, GCC members are increasingly leveraging geo-economic instruments, diplomatic activism, and infrastructure-based influence to shape regional and extra-regional outcomes. This reconfiguration marks a shift from passive alignment toward active participation in a contested multipolar order, with significant implications for regional power balances and for external partners, including India.

India–GCC Relations: A Strategic Overview

India–Gulf relations have evolved from largely transactional, energy-centric interactions into a multifaceted strategic partnership shaped by shifting regional and global dynamics within an increasingly multipolar international order. Historically, ties between India and the Gulf region were rooted in civilizational exchanges, maritime trade across the Indian Ocean, and cultural linkages dating back centuries. In the post-independence period, India's engagement with the Gulf was constrained by the imperatives of Cold War bipolarity, its own limited economic capacity, and a foreign policy principled on non-alignment. It was only after India's economic liberalization in the early 1990s, combined with the growing strategic salience of West Asia, that relations with the GCC began to deepen in a sustained and structured manner.

Energy has long constituted the central pillar of India–GCC relations, anchoring the partnership within a framework of resource interdependence. The GCC accounts for a substantial share of India's crude oil and liquefied natural gas imports, rendering the region indispensable to India's energy security. Over time, however, this dependence has been complemented by expanding trade and investment ties. Bilateral economic engagement has diversified beyond hydrocarbons to include petrochemicals, fertilizers, food security, infrastructure development, and services. From a geo-economic perspective, this deepening relationship reflects complementary hedging strategies, wherein India seeks to reduce exposure to energy supply vulnerabilities while GCC states leverage access to the Indian market to support post-oil economic transformation.

The Indian diaspora constitutes a critical yet often under-theorized dimension of India–GCC relations. Over eight million Indian nationals reside and work across GCC countries, forming the largest expatriate community in the region. Remittances from the Gulf represent a major source of foreign exchange for India, contributing significantly to domestic consumption, balance-of-payments stability, and socio-economic development.¹² Beyond economic value, the diaspora functions as a form of social and soft power, embedding India within Gulf labour markets, service sectors, and everyday economic life. This human connectivity has also elevated the political salience of the Gulf in Indian foreign policy, compelling New Delhi to adopt a more pragmatic and engagement-driven approach toward GCC governments. Alongside economic and societal linkages, defence and security cooperation between India and the GCC has expanded markedly over the past decade. Shared concerns regarding maritime security in the Indian Ocean and the Arabian Sea, terrorism financing, piracy, and regional instability have driven closer strategic coordination.

India has institutionalized defence dialogues, conducted joint military exercises, and enhanced naval cooperation with key GCC states particularly the UAE and Saudi Arabia reflecting differentiated levels of strategic convergence within the bloc. Counterterrorism cooperation has also intensified, marked by intelligence-sharing mechanisms and extradition agreements. Viewed through the lens of regional security interdependence, these developments underscore India's recognition of the Gulf as integral to its extended neighbourhood and maritime security architecture. Taken together, India–GCC relations have transitioned from a narrow energy-based engagement to a comprehensive strategic partnership encompassing economic interdependence, diaspora diplomacy, and security cooperation. This evolution

reflects both India's emergence as a consequential Indo-Pacific actor and the GCC's transformation into a more autonomous and globally connected geopolitical bloc. As the GCC's strategic posture continues to evolve, its relationship with India is likely to assume growing significance in shaping regional stability and broader multipolar alignments across West Asia and the Indo-Pacific.

Implications of the GCC's Emerging Role for India

The GCC's transformation into a more autonomous, geo-economically oriented, and diplomatically assertive bloc carries significant implications for India's strategic interests and necessitates a recalibration of its West Asia policy. As GCC states adjust their external engagements amid intensifying multipolar competition and post-oil economic transitions, India confronts a complex mix of opportunities and constraints. The GCC's evolving role intersects closely with India's priorities in energy security, infrastructure development, maritime stability, and Indo-Pacific strategy, while simultaneously presenting challenges linked to great-power rivalry and persistent regional volatility.

Opportunities for India

- **Energy Security Diversification**

The GCC's continued centrality in global energy markets remains critical for India, which imports over eighty percent of its crude oil requirements. However, the nature of this energy relationship is evolving beyond short-term transactional arrangements. GCC states are increasingly investing in long-term supply contracts and strategic petroleum reserves abroad, offering India opportunities to transition toward deeper strategic energy partnerships. Investments by Saudi Arabia and the UAE in Indian refineries and petrochemical complexes exemplify this shift, embedding India within Gulf energy value chains rather than positioning it merely as an end consumer. In parallel, GCC-led investments in renewable energy, clean technologies, and green hydrogen align closely with India's own energy transition objectives. Cooperation in these emerging sectors allows India to hedge against long-term hydrocarbon volatility while sustaining strategic ties with Gulf producers, thereby enhancing resilience within a decarbonizing global energy order.

- **Investment and Infrastructure Cooperation**

The GCC's expanding role as a global capital exporter driven by sovereign wealth funds and economic diversification strategies creates substantial opportunities for India in infrastructure financing, manufacturing, logistics, and digital sectors. Gulf sovereign wealth funds have emerged as major investors in Indian highways, ports, airports, data centres, and start-up ecosystems. From a geo-economic perspective, these investments foster deeper interdependence and directly support India's domestic development agendas, notably the *Make in India* and *Gati Shakti* initiatives.¹³ This infrastructure cooperation possesses a significant transregional dimension. GCC investments in ports, shipping, and logistics infrastructure align strategically with India's ambition to become a pivotal hub connecting the Indian Ocean, the Middle East, and Europe. This convergence is institutionalized in projects like the India-Middle East-Europe Economic Corridor (IMEC), which aims to establish an integrated multimodal transit network. These initiatives enhance India's strategic relevance for Gulf states seeking diversified and resilient trade routes amid global supply chain disruptions.

- **Strategic Alignment in the Indo-Pacific and I2U2**

The GCC's increasingly outward-looking strategic posture has created space for selective convergence with India in the Indo-Pacific. Although Gulf states do not formally subscribe to Indo-Pacific strategic frameworks, their growing economic and security interests in maritime trade routes, chokepoints, and supply chains overlap with India's regional priorities. This convergence is most evident in minilateral platforms such as I2U2 (India–Israel–UAE–United States), which emphasizes cooperation in technology, food security, infrastructure, and clean energy without formal military alignment. For India, engagement with GCC states through such flexible, issue-based arrangements enables strategic collaboration while preserving strategic autonomy.¹⁴ The GCC's willingness to participate in pragmatic coalitions enhances India's capacity to shape regional governance outcomes in a contested multipolar environment.

Challenges and Constraints

- **GCC's Deepening Ties with China**

One of the most significant constraints for India arises from the GCC's expanding strategic and economic engagement with China. Beijing has emerged as a major energy customer, infrastructure

partner, and technology provider for Gulf states, particularly through the Belt and Road Initiative.¹⁵ From India's perspective, China's growing presence in Gulf ports, telecommunications networks, and logistics infrastructure raises concerns regarding strategic influence over critical maritime routes and chokepoints. While GCC states frame their engagement with China as pragmatic hedging rather than political alignment, these dynamic limits India's ability to cultivate exclusive strategic partnerships and complicates long-term security cooperation in the region.

- **Regional Instability and Geopolitical Balancing**

Persistent instability across the West Asia continues to pose risks for India–GCC relations. Conflicts involving Iran, Yemen, Gaza, and Red Sea security directly affect maritime trade flows, energy markets, and the safety of the Indian diaspora. India's strategic challenge lies in deepening engagement with GCC states while maintaining functional relations with Iran and avoiding entanglement in regional rivalries. Viewed through the lens of regional security complex theory, instability in the Gulf inevitably spills over into the Indian Ocean region, reinforcing India's stake in Gulf security while constraining its diplomatic manoeuvrability.

- **Policy Coherence within the GCC**

Despite growing coordination, the GCC remains an internally diverse grouping characterized by varying threat perceptions, foreign policy priorities, and external alignments. Divergences among member states particularly in their approaches toward Iran, Turkey, and major external powers limit the GCC's coherence as a unified strategic actor. For India, this internal heterogeneity necessitates a differentiated, bilateral engagement strategy rather than a uniform GCC-wide approach, increasing diplomatic complexity and transaction costs but also allowing for tailored partnerships with key Gulf states.

Conclusion

The GCC's emerging geopolitical role reflects a significant transformation in the Gulf's political economy and strategic behaviour. Moving beyond hydrocarbon dependence and reliance on external security guarantees, GCC states are increasingly employing geo-economic instruments, diplomatic activism, and greater strategic autonomy to navigate a multipolar international order. Economic diversification, sovereign wealth fund activism, infrastructure diplomacy, and expanded mediation roles have repositioned the GCC from a largely passive regional grouping into a consequential geopolitical actor with influence extending across West Asia and the Indian Ocean. For India, this transformation presents both opportunities and challenges. Evolving Gulf energy strategies allow India to shift from transactional dependence toward long-term partnerships integrating energy security, investment, technology collaboration, and clean energy cooperation. Expanding Gulf investments in Indian infrastructure, manufacturing, and digital sectors further strengthen economic interdependence and support India's development objectives. Strategic convergence in maritime security and participation in flexible minilateral arrangements such as I2U2 highlight the potential for deeper cooperation while preserving India's strategic autonomy. At the same time, India must navigate a complex Gulf environment shaped by intensified great-power competition, the GCC's deepening engagement with China, regional instability, and intra-Gulf policy divergences. These dynamics require a calibrated, differentiated approach that balances strengthened bilateral partnerships with diplomatic flexibility. Ultimately, the GCC's transformation underscores growing Indo–West Asian interdependence, with India's ability to align geo-economic cooperation with long-term strategic objectives shaping its regional and global influence.

References

1. Anthony, J. D. (2013). *The Gulf Cooperation Council: Challenges and prospects*. Middle East Institute.
2. Barnett, M., & Gause, F. G., III. (1999). Caravans in opposite directions: Society, state, and the development of a community in the Gulf Cooperation Council. *Security Studies*, 8(4), 161–197.
3. Ulrichsen, K. C. (2016). *The Gulf states in international political economy*. Palgrave Macmillan.
4. Roberts, D. B. (2017). *Qatar: Securing the global ambitions of a city-state*. Hurst; Kamrava, M. (2013). *Qatar: Small state, big politics*. Cornell University Press.
5. Boswell, C. (2019). The UAE's regional strategy. *International Affairs*, 95(4), 863–879.
6. Haykel, B. (2020). Saudi Arabia's Vision 2030. *Survival*, 62(2), 7–28; Lippman, T. W. (2016). *Saudi Arabia on the edge*. Potomac Books.

7. Gause, F. G., III, & Kinninmont, L. (2021, December). *The Gulf states and the shifting global order*. Chatham House.
8. Janardhan, N. (2016). *The Arab Gulf's pivot to Asia*. Gerlach Press; Pant, H. V., & Joshi, Y. (2016). India's expanding strategic engagement in the Middle East. *International Affairs*, 92(5), 1137–1155.
9. Mohan, C. R. (2021). India and the new Middle East. *Indian Foreign Affairs Journal*, 16(2), 101–115.
10. Saudi Vision 2030. (2016). *Vision 2030: Kingdom of Saudi Arabia*. Government of Saudi Arabia; UAE Government. (2017). *UAE Centennial 2071 and Vision 2050*. Government of the United Arab Emirates; Qatar General Secretariat for Development Planning. (2008). *Qatar National Vision 2030*. Government of Qatar.
11. Kamrava, M. (2013). *Qatar: Small state, big politics*. Cornell University Press; Roberts, D. B. (2017). *Qatar: Securing the global ambitions of a city-state*. Hurst.
12. Ministry of External Affairs, Government of India. *Population of overseas Indians*.
13. Government of India. (2021). *National master plan for multimodal connectivity: PM Gati Shakti*. Government of India.
14. Mohan, C. R. (2021). Minilateralism and the new regional architecture. *Indian Foreign Affairs Journal*, 16(2), 95–100.
15. Pant, H. V., & Panda, J. (2020). China's expanding strategic footprint in the Gulf. *International Affairs*, 96(6), 1457–1475.

