

# INDIA'S NEW ABNORMAL

Doctrine, Deterrence and De-escalation in South Asia's  
Post-war Dynamics

Sherry Rehman





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Post-War Dynamics

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The 87-hour near-war between India and Pakistan in May 2025 has given a new diplomatic and strategic opportunity to Islamabad to position itself as a middle-power pivot for stability in the region. In contrast, India has found its envisioned role as a growing strategic player, frayed at the edges of the crucial Asia-Pacific region, where it has largely been seeking to enhance its global relevance not just through economic heft but by a country-narrative rooted in conflict and contested factuals, instead of sustainable security. Bordering in fact, on self-sabotage for short-term political gains, the Modi regime's unprecedented attempts at strategic dominance of South Asia via its recent military flex have broadly been seen as irresponsible as well as ineffective. Even through the doctrinal and deterrence prisms, the recent conflict has redefined new red lines between Pakistan and India, while also frontloading the dangerous implications of India's high-risk play with a nuclear neighbour. Not only has India over-reached in its unilateralism, it has added to the fraught equation with Pakistan by pursuing a new appetite for disrespect of international treaties by weaponising water through its illegal one-sided "suspension" of the Indus Waters Treaty, that has stood the test of both time and conflict between the two countries.<sup>1</sup>

Given the stakes and the history of virulent mistrust between the countries, it is therefore essential to unpack the strategic dynamic behind the recent hot conflict and examine the Indian doctrinal impulse that seeks to redefine the geopolitical calculus between the two countries in a new strategic 'abnormal', by abandoning the vital tool-kits of restraint, diplomacy, international law, verifiable facts, and reputational maturity. Developments since the ceasefire have also brought into sharp relief the role of third-party mediation, rehyphenation, and a public reminder by U.S. President Trump that Kashmir remains an international talking point as one of the longest outstanding disputes at the UN, awakening the region to ground realities that cannot be deepfaked away as non-existent.<sup>2</sup> Questions about the future of the region, without an underpinning of basic strategic predictability, absent a path forward to sustainable geo-political frameworks, diplomatic channels, and fundamental stability remain hostage to serial speculation in an atmosphere of heightened bilateral distrust between Pakistan and India.

# INDIA'S NEW ABNORMAL

The recent conflict between Pakistan and India, while new in scale, depth and risk, is a hard articulation of post-Modi India's policy approach to Pakistan, both kinetic and non-kinetic. Motivated by a doctrinal impulse to coerce Pakistan into accepting unilateral outcomes imposed by New Delhi, this fundamentally exclusionary framework is more than cosmetically different from the Nehruvian sophistication that cloaked Indian statecraft and diplomacy since 1947. While post-partition Pakistan was never truly given the space to benefit from a broad peace dividend in South Asia, it was Narendra Modi's project of saffronising the Indian state that has taken the geopolitics of ultranationalism to another level. Emboldened by India's rising economic and diplomatic clout, a hubristic BJP leadership, ideologically inspired and electorally beholden, has pursued goals that privileged a surge in conflict over any bilateral communication. Modi's hawkish national security and foreign policy team has attempted to shift the goal posts in the India-Pakistan conversation by pursuing a Pakistan policy predicated on four pillars; using terrorism as a dog-whistle while fomenting instability inside Pakistan, seeking to isolate Pakistan diplomatically in the region and beyond, undertaking punitive military action and its ready threat against Pakistan as a tool of coercion, and pursuing unilateral actions on bilateral disputes such as Kashmir and the Indus Waters Treaty with political fait accompli outcomes.

Today as vast swathes of India continue to become inhospitable to non-Hindu identities, a potent political current of seeking an "enemy within and enemy without" has gathered momentum in Modi's vision of the new Bharat. Its most outrageous symbolic representation of Hindutva-based state and civilisational expansionism is the Akhand Bharat map of a "Greater India" which has officially been mounted in the Indian Parliament two years ago. This map builds its ideational foundations on an erasure of Pakistan's sovereign boundaries, and obviously seeks to inspire MPs seeking political relevance to chest-thump India's way toward such a potential erasure.<sup>3</sup> The map is in fact, not just a collective expression of an ancient Indian past, but a very real metaphor for the new Hindutva republic's inflated geographical ambitions. To ensure that it was not seen as a cultural folly, the same map was also broadcast in a tweet by Indian Parliamentary Affairs Minister Pralhad Joshi as a futuristic iteration of "Undivided India", which absorbs not just Pakistan, but Afghanistan, Nepal, Myanmar and Bangladesh in a grand new strategic conceit.

Despite such consistent belligerence over the past decade, India has floundered in injecting substance into this millenarian dream of regional leadership, let alone domination. Instead of building on real economic gains as a strategic regional leader, what New Delhi has actually achieved has alienated it from many countries, particularly Pakistan. In this latest "limited war" with Pakistan, Modi's India has only ended up lowering the threshold for conflict, exposing the limits of its own capabilities, and testing the patience of an international community preoccupied with other global crisis. At the same time, over the last decade, India's political elites seem to have become victims of their own political echo-chamber, miscalculating Pakistan's resolve and capabilities. Nowhere is this more visible than in Pakistan's response to Indian aggression in both 2019 and 2025.<sup>4</sup> In two successive military confrontations, Pakistan has more than held its own against a much larger adversary by demonstrating the necessary capabilities to match India along the entire spectrum of limited conventional conflict. It has also

demonstrated, on both occasions, that it has the political appetite and willingness to respond to any infringement of its sovereignty.

Meanwhile, Pakistan's leadership across the political spectrum has cautioned against India's reckless behaviour in an unstable strategic environment. It has consistently called for dialogue to find pathways towards crisis management, normalisation and dispute resolution, but its overtures have been publicly shunned by Modi's core team, while the choreography of hypernationalistic, state-led hate has only grown, imperiling the entire region via a volatile barrage of words that shrink all space for rational discourse. In this new play, India's Prime Minister has doubled down on an unsuccessful, short-sighted policy model that has imposed reputational costs on India by framing it as a 'new normal' in which India will 'enter and hit Pakistan in its home'.<sup>5</sup> Modi is not alone. Over the last three years, India's senior ministers have repeatedly threatened and baited Pakistan by issuing provocative statements. In July 2023, India's Defence Minister Rajnath Singh proclaimed that they were "ready to cross the Line of Control".<sup>6</sup> In May 2024, Home Minister Amit Shah said "we will take back PoK if the BJP government returns".<sup>7</sup> In March 2025, Foreign Minister Jaishankar again repeated that his government would "take back PoK which has been stolen by Pakistan".<sup>8</sup> The response from Islamabad has been a textbook case of strategic state responsibility.<sup>9</sup> All responses have focused on managed restraint which have included avoiding a war of words, calling for dialogue, and signaling that any adventurism will be met with a quid pro quo-plus response.

The outcome of India's hardline posturing has resulted in reducing its own policy bandwidth and political options. A chronology of the Pahalgam crisis, in fact, reflects trendlines of dangerous inelasticity that have crept into the Indian policy posture. After the attack in Pahalgam in which several tourists were killed, India's mainstream media only took a few minutes to pin the blame on Pakistan for the attack, and ramped up calls for immediate military action.<sup>10</sup> No space or time was created to build a credible case against Pakistan, based on facts or evidence. This media crescendo was not discouraged by official quarters in New Delhi, despite none of the attackers being found, captured, killed, or positively identified.<sup>11</sup> Despite the furor that triggered the 87-hour war, the evidence was so egregiously missing that India's own government was never able to officially accuse Pakistan as responsible for Pahalgam attacks until the morning of 7<sup>th</sup> May. Even when the Indian government announced a series of diplomatic actions against Pakistan on the 23<sup>rd</sup> April, which included holding the Indus Waters Treaty in abeyance and a reduction in diplomatic presence, it did so using vague language about 'cross-border linkages' or without making public any evidence linked to the attacks.<sup>12</sup> The unprecedented water treaty suspension was called a "precision strike" by India, making the whole episode suspect in both motive and outcome.

Over the next two weeks, as it became clearer that India had little evidence it could muster to justify its claim, an orchestrated information campaign was launched against Pakistan. Instead of asking the hard questions about its own intelligence failures in a heavily militarised region several kilometers away from the Line of Control, India's media resonated with calls for an existential "final war" against Pakistan to "take back PoK" and "break Pakistan into four".<sup>131415</sup> Political leaders, analysts, and media professionals joined in the noise to beat a war drum that drowned out all political space for responsible decision-making in New Delhi. The public mob-rancour whipped up against Pakistan was so strong that it lost crucial connections to the pursuit of facts or the importance of establishing an evidence-based rationale for action. Even after foreign diplomats, who had been briefed by India's MEA on the Pahalgam attack, leaked to the international media that 'no concrete evidence was presented' linking any of the attackers with Pakistan, their questions on whether it made sense to go to war based on 'past instances' were ignored.<sup>16</sup> In a classic case of self-sabotage, it was clear that the Modi government had painted itself into a policy corner. A spiral of rising political expectations to go to war with Pakistan had been created by its own regime-rhetoric, to the point where not taking military action would risk serious backlash from a restive public that had been fed years of religio-nationalist propaganda as mainstream policy. In what became a timeline of a crisis foretold, Modi's base, addicted to exclusionary politics, pushed for the threshold for conflict with its nuclear neighbour to become dangerously lower than before in order to catapult New Delhi into a state of war with its nuclear neighbour.

India's hyper-nationalist approach during and after the crisis clearly means that a 'new abnormal' has been introduced into the pre-war, risk-prone and fraught Indo-Pak bilateral equation in South Asia.

# A DOCTRINE OF PERMANENT CONFLICT

Why is it a new abnormal? One, because while a ceasefire is in place for now, the cold peace is being kept deliberately fragile by New Delhi which insists on using the vague term of a 'pause' to describe the cessation of hostilities. At all public points, Indian officials deliberately refused to acknowledge a need or search for off-ramps, leading stability protocols or calls for essential communication with a perilously high political cost. Due to such high public heat, from 2019 to this day, DGMO contacts remain the only form of communication between the two countries. A host of CBMs recommended by Islamabad and international players, to manage stability and responsible deterrence have been pushed aside by Narendra Modi's cabinet, which continues to define the conflict in ongoing terms, principally because New Delhi needs to redefine the outcome of the short war with a new headline for domestic Indian consumption. According to Indian Defence Minister Rajnath Singh, the May conflict was just a trailer, while the whole movie is yet to follow.<sup>17</sup> Narendra Modi also reminded his public, in a recent display of yet another vulgarisation of statecraft, that his bullet is on the ready for Pakistan's youth. Such messaging was condemned widely in Pakistan as dangerous, provocative and precipitous for a number of reasons.<sup>18</sup>

This new abnormality in the state of play with Pakistan that India wants to pursue, is not confined to the politics of a narrative war either. It is about keeping the region in a constant state of instability and conflict. In a public address after the ceasefire, India's Prime Minister has made, by all yardsticks, a bizarre policy announcement of India's future approach towards Pakistan. According to Modi, any terrorist attack in the future will be seen as an act of war irrespective of evidence or the lack thereof, where no distinction is made between non-state actors and a government.<sup>19</sup> Jettisoning all strategic caution to the wind, Modi goes on to add that India will not be deterred by what he calls 'nuclear blackmail'.<sup>20</sup> This articulation by India's leadership signals a quest for perpetual conflict, or near-war, rather than any normative search for security through peace and stability. It also delegates the trigger for war between two nuclear neighbours, and two of the world's largest militaries, to any gun-toting terrorist infesting the region with an AK-47. Most disturbingly, it seeks to brush aside the very real escalation dynamics in a nuclear dyad as 'blackmail', demonstrating a worrying lack of appreciation of the real risks involved in conflict. The utility of such an irresponsible approach is also limited, as it may feed into Modi's ultra-nationalist project at home, but has little coercive value against Pakistan.

In sum, while Pakistan pursues a trajectory of regional connectivity and diplomatic engagement across the multilateral board, Indian state identity has been turned on its head from at least performatively secular to actively exclusionary. What fuels this doctrine of muscular, permanent conflict?

It is, arguably, Narendra Modi's ideology, manifested as institutionalized state violence in Gujarat during his days there as chief minister. Before 2014 when he mustered a parliamentary majority to rule New Delhi, his record in anti-Muslim massacres had earned him no international friends. In fact, he was effectively barred entry in the US and EU on the basis of his rights record.<sup>21</sup> His tenure in Gujarat was also markedly different from an earlier, Vajpayee avatar of the BJP.<sup>22</sup> Despite the BJP's ideological definition of Muslims as essentially "other" to their identity-based vision, the policy of political accommodations did not unleash a widespread normalisation

of pogroms against minorities all over India before Modi's ascent to power. Nor did it invoke a foreign policy of unbridled expansionism at the expense of its neighbours. It was the ideological realignment of the Indian state under Modi that explicitly and deliberately moved Hindutva from the margins of political discourse to the centre of governance. No longer confined to cultural rhetoric or electoral strategy, Hindutva, or "Moditva", as Indologist Christopher Jaffrelot describes it, now informs the state's legislative agenda, institutional arrangements and public pedagogy.<sup>23</sup> The markers of exclusion are everywhere, systematically embedded in the cultural, political and legal framework of the Indian state. The Citizenship Amendment Act (CAA), for instance, passed in 2020, codified a hierarchy of belonging, offering fast-tracked citizenship to non-Muslim refugees while excluding persecuted Muslim minorities.<sup>24</sup> Combined with the proposed National Register of Citizens, it signalled a redefinition of Indian citizenship itself, placing millions of Muslims at risk of statelessness.<sup>25</sup> The dismantling of Muslim civic infrastructure, including moves against the Waqf Board, has intensified under a governance model that treats minority identity as a liability rather than a constitutional guarantee. From the reinvention of academic syllabi to cultural milestones, India's own plural history is also being systematically rewritten, with a focus on the erasure of the country's Muslim rule.



Source: Manish Swarup/Associated Press

Within India, these developments are normalised by a pliant media ecosystem; beyond its borders, they complicate New Delhi's claim to democratic leadership. The transformation of India into a Hindutva republic recasts it as a state driven less by coexistence than by exclusion.

# WHAT WENT WRONG FOR INDIA

## 1. Disinformation on Steroids

Disinformation has always been a tool used by militaries and states to pursue strategic goals. Modi's India, however, has chosen to amplify disinformation and fake news to levels where the narrative bubble has assumed a dangerous life of its own, because strategic decisions are being taken based on 'facts' that do not hold up to scrutiny. This normative shift to non-factual grounds for entire policy as part of its consistent political and strategic positioning both at a global and domestic level has created multiple problems for Indian credibility as well as clout. It is a problem because at home in India, it has created a disjoint between reality and myth, fuelling what is known as a classic 'commitment trap'. For example, for the entire duration of the war, 'reality-show blitzkrieg' mode drove the news cycle on Indian mainstream television channels, where overnight, entire Pakistani cities were wiped out, and the map of Pakistan stood airbrushed out in a new geography of imperial fantasy.<sup>26</sup> The alleged destruction of Karachi port, the surreal invasion of Lahore, the supposed shooting down of Pakistani F-16s and capture of pilots was not just disinformation perpetuated for ratings.<sup>27</sup> It was a deliberate feed of disinformation from defence and government sources aimed at obfuscating the conflict environment through a mix of fact and outlandish fiction which could allow India's spin masters to craft a VFX victory post-conflict. But when the dust started settling on downed IAF aircraft, the ignominious gap between promise and outcome began to be widely questioned both internationally and domestically.<sup>28</sup> The wreckage of downed Rafale and other fighter aircrafts could not be erased as easily.

Faced with a crisis of credibility, the Modi government's knee jerk reaction was to start an immediate crackdown on independent and international media.<sup>29</sup> Published stories were taken down from Indian news websites such as The Hindu and TheWire.<sup>30</sup> International news outlets such as Xinhua, TRT, BBC Urdu were blocked from being viewed in India.<sup>31</sup> Simultaneously, thousands of X accounts on social media, including those of credible journalists from within India and abroad, were blocked en masse.<sup>32</sup> The contrast could not be starker. As India attempted to censor news, Pakistan removed restrictions on X.<sup>33</sup> Pakistan's citizens shared video footage of Indian drones being shot down over cities as easily as memes on the ongoing conflict.

The eventual defogging of the war post-ceasefire has triggered an impulse to create even more 'facts on the ground' in India to manage a story that has spun out of the state's control. Instead of creating space for peace, which inevitably follows wars where no decisive win is possible, the Indian government is keeping its public and mass media on the boil for further conflict. Partially at play, of course, was the domestic audience compulsion that was driving Modi to "post" wartime successes before a Bihar election, as former foreign minister Yashwant Sinha suggested, and perhaps even an RSS re-evaluation of India's place in the world under an over-promising Prime Minister. Indian NSA Ajit Doval's statements on 11 July 2025, suggesting that Pakistan took a hit in 23 minutes while saying India does not have a "glass broken" in the May conflict is a clear window into the denialism defining the responses of the Amit Shah, Narendra Modi and Doval troika.<sup>34</sup> The fact that the pronouncements of this core group are increasingly and publicly under Indian domestic fire for gross miscalculation, also amounts to a

surreal disconnect with the reality being slowly unveiled in the public domain in India by both international and national security sources. It reveals a mindset that is doggedly wedded to a new doctrine of perpetual conflict, which adds not just to the credibility crisis that Indian losses on ‘Operation Sindoor’ have triggered, but also its own inability to move forward without serial risks to the region.

The Indian strategic community’s constant and deliberate erasure of third-party mediation that brought about a ceasefire is also a case in point about the fragility of a highly politicised deterrence environment. President Trump and his administration’s more than twenty reassertions of who mediated what, including the American White House’s very clear ownership of role in effecting the ceasefire is regularly ignored by New Delhi.<sup>35</sup> This in itself implies a dangerous arc of belligerence, structural volatility and deniability about its role in not just unprovoked kinetic action, escalation, but also a reckless embrace of strategic and doctrinal posturing based on political narrative-building instead of evidence. The entire strategic edifice of restraint, which involved responsible signaling between the two countries is now off its axis, exposing a new politically-driven theory of deterrence based on a break with avoidance of risk.

India’s tryst with fake news is not new. In the 2019 Balakot skirmish, a similar pattern has played out. India had falsely claimed that 300 alleged terrorists were killed in their airstrike.<sup>36</sup> After evidence of an Indian pilot being captured in Pakistan was made public, India again falsely claimed that the same pilot had shot down a Pakistan Airforce F-16.<sup>37</sup> Both claims were dismissed by international news organisations. In another explosive exposé in 2020, a Brussels-based organisation working on disinformation campaigns in the European Union uncovered a 15 year multi-front Indian disinformation infrastructure with fake news websites, window-dressed UN organisations and scholars aimed at defaming Pakistan.<sup>38</sup> By all standards, India’s descent into state reliance on the fabrication of news had reached such staggering levels that international observers began examining their very real policy implications. The most recent case was in Pahalgam itself, where “four terrorists” identities were shared in a dossier with the international community by India, but later withdrawn under scrutiny by their own NIA (National Investigation Agency).<sup>39</sup>

## 2. The Battlefield Flip

In an age of cyber, quantum and space warfare, the odds have changed the battlefield calculus. Size and strike carriers matter, but no longer enough to tip the air-land-sea nexus in conflict outcomes. Here too, nothing could be more different than Islamabad’s cooler play than New Delhi’s hot textbook. In sharp contrast with Islamabad’s measured and mature kinetic response to a war that was essentially thrust on Pakistan, Modi’s India clearly sought to position itself as a 21<sup>st</sup> century great power while seeking regional hegemony based not on its ability to keep the peace, but on its promise to wage perpetual war. This is in itself a strategic oxymoron in the postwar world order, which India is openly challenging as a regional power playing outside all UN rules with impunity. In a multipolar world where hegemony cannot establish sustained dominance by continuously destabilising a region or by attempting to change political borders in a strategic ecosystem that is conventionally evolving but also deterred by nuclear capabilities. The most obvious hole in India’s new doctrine of muscularity is that similar to Pulwama, 2019, in the 2025 conflict, Modi’s team miscalculated Pakistan’s conventional capacities both in terms of military agility and skill, as well as in terms of defence hardware and data upskilling.<sup>40</sup> New Delhi also forgot that a material shift in warfare had changed the state of play.

A brief telescoping of the kinetic encounters is useful. The best illustration of Pakistan’s multi-domain approach to warfare was the kill-chain which networked ground, air, cyber and space capabilities to achieve more than the sum of its parts.<sup>41</sup> This particular capability was a result of indigenisation and new-age combat training. The domestically developed Link-17 allowed Pakistan’s radars, sensors and fighting platforms from varying countries of origin to speak to each other in real time.<sup>42</sup> Key capabilities like first-look, first-shoot capability due to the Chinese origin PL-15E air-to-air missile, interception and jamming of Indian radio communications between fighter aircrafts and mission control, high fidelity battlefield awareness, and dominance of the electronic warfare domain were on display.<sup>43</sup> While Pakistan did not seek to punish civilians, as this goes against both the rules of

warfare and codes of humanitarian conduct, the kinetic response to a breach of territorial sovereignty was precise, strategic and proportionate. The official readout from Islamabad was careful to respect the rule of law, and cited Article 51 of the UN Charter as a right to self-defence. Despite extreme political provocation in the public domain from New Delhi, Pakistan showed no interest in knocking down more IAF jets than needed to respond or in using more standoff weapons than in response to late-night attacks. Yet the ability to manage conventional deterrence in a new multi-domain battlefield was clearly established by the Pakistan Air Force.

The result was that even in an attack choreographed by the Indian Air Force, Pakistan shot down six Indian 4.5 generation aircraft in the early hours of 7<sup>th</sup> May.<sup>44</sup> It is important that the loss of several fighter aircraft has been confirmed by India's Chief of Defence Staff.<sup>45</sup> Reporting by international media and wreckage of fighter aircraft within India and Indian Illegally Occupied Jammu and Kashmir also confirmed that several planes were shot down.<sup>46,47</sup>



Source: AFP/Getty Images

After losing its mainstay fighter aircraft, the Indian Air Force remained grounded for two days as confirmed by India's Chief of Defence Staff in an interview on the sidelines of the Shangri La Dialogue.<sup>48</sup> On 8<sup>th</sup> May, India escalated by launching several Israeli-made drones into Pakistan by targeting a couple of air defence locations and harassing the civilian population in large cities.<sup>49</sup> It is important to note here that while there was ample evidence of wreckage of Indian drones in Pakistani cities, there was no wreckage or evidence to validate Indian allegations of Pakistani drone incursions on 8<sup>th</sup> May, which has been denied by Pakistan. Almost all drones launched by India were engaged and brought down through soft-kill or ground fire.

On the night between 9<sup>th</sup> and 10<sup>th</sup> May, India again escalated by attacking three Pakistani airbases without provocation.<sup>50</sup> This time Pakistan announced that it would retaliate through Operation Bunyanum Marsoos and undertook attacks across 30 plus Indian military installations and airbases using Fatah-I and Fatah-II guided multiple rocket launch system, long range artillery fire, loitering munitions and air launched hypersonic cruise missiles. In response to Pakistan's wide ranging operation, the Indian Air Force unable to take on the Pakistan Air Force in the air, resorted to firing a number of supersonic Brahmos missiles at airbases causing some damage to runways and structures, with the only significant damage occurring at PAF Bholari where an aircraft shelter was hit and several maintenance personnel lost their lives.<sup>51</sup>

As the conflict turned a corner on the morning of 10<sup>th</sup> May, President Trump and his aides jumped into the equation to try and seek an off-ramp in a conflict that was escalating very quickly.<sup>52</sup> President Trump publicly

claimed credit for getting both sides to agree to a ceasefire, something India has gone out of its way to deny. What is evident though is that Vice President Vance and Secretary Rubio talked to the respective leadership in Islamabad and New Delhi, resulting in a ceasefire.<sup>53</sup> It is also clear that the first mention of de-escalation was made in India's press briefing on Operation Sindoor on the morning of 10<sup>th</sup> May.<sup>54</sup> This was followed by a press announcement by India's Foreign Secretary, of an agreement to cease hostilities after a call between the Director General of Military Operations (DMGOs) of both countries.<sup>55</sup> It is significant that Pakistan made no reference to de-escalation or the ceasefire on 10<sup>th</sup> May until after President Trump's media post confirmed that a ceasefire had been reached. It goes to reason that if Pakistan was the one seeking a ceasefire, the Indians would have insisted that Pakistan be the first to publicly call for de-escalation.

The strategic lessons from the conflict also signpost the 'new abnormal' in the region. In any future conflict, as the character of war evolves, near-peer militaries will use stand-off weapons, making the decision to enter into a limited conflict an easier one to make. But off-ramps for conflict may not be readily available each time and with the notion of victory becoming more subjective in such a conflict, the pressure to go just a little farther will increase. For a country like Pakistan, on which war was thrust by a much larger military adversary, achieving a stalemate and holding its own is victory enough.<sup>56</sup> For India, despite post-facto claims that its military aims were only to target alleged terrorist infrastructure, the scale and speed of escalation betrays that its strategic objectives went beyond merely targeting any alleged terrorist sites but instead were designed to militarily coerce Pakistan – an objective it failed to achieve.

This leaves Modi's geopolitics in a problematic new strategic negative for providing net security to its allies in what is called the Indo-Pacific space. It amplifies the gap between the perception of India as a self-proclaimed net security provider and the reality of India that continues its strategic over-reach in a region no longer open for violent hegemony. It also builds into the conclusion of the current conflict, which from India's perspective remained inconclusive, key drivers that could reignite the limited war.

### 3. The Diplomatic Moment

Decades of coercive diplomacy in the region and beyond have led to a shift in India's diplomatic power. While this may be a moment, it is markedly enhanced by India's tactical and strategic failures in Operation Sindoor, which found little or no diplomatic support among its international friends or allies. Diplomatic teams sent out by Indian PM Modi under veteran politician Shashi Tharoor, had no credible or constructive message to share except to blame Pakistan. In contrast, Islamabad's team under former Foreign Minister Bilawal Bhutto Zardari had a clear message of post-war peace and possible roadmaps for strategic normalisation, conditional only on the reduction of political provocation emanating from high offices in New Delhi.<sup>57</sup>

On the ceasefire issue, New Delhi was at pains to insist that it had managed the cessation of hostilities on its own, despite the U.S. administration's contradiction over twenty times in the public domain, that no, it had clearly help broker the ceasefire. U.S. President Donald Trump made it a point to repeatedly praise both countries for adhering to the ceasefire, and issued positive statements about U.S. partnership with Pakistan.<sup>58</sup> Later in June, Trump left the G7 meeting early, without meeting PM Modi.<sup>59</sup> Two days later, on June 18<sup>th</sup>, he hosted Field Marshal Asim Munir at the White House. As observers recalled, this meeting served as a the perfect comeback to familiar U.S. reliance on Pakistan at critical strategic junctures, as seen during the Cold War and the War on Terror.<sup>60</sup> Soon after, General Michael Kurilla, Commander of U.S. Central Command, described Pakistan as a "phenomenal" counter-terrorism partner in eliminating ISIS-Khorasan leadership. Other U.S. officials stated a renewed preference to pursue security cooperation with Pakistan, as well as trade and investment opportunities.<sup>61</sup> None of this went down well with audiences in India, used to seeing Pakistan's loss as India's gain.

Within South Asia as well, Modi's India now holds the unenviable position of being the most disliked neighbour. Nepal has accused India several times of unofficial blockades, whereas in the Maldives an 'India Out' campaign gained traction under former President Abdulla Yameen.<sup>62</sup> SAARC remains dormant under an Indian overhang of rejection, with no summit held since 2014. Member states such as Bangladesh, Sri Lanka and Nepal have been

pushing for a revitalisation of the platform despite India's efforts to continue blocking Pakistan's participation.<sup>63</sup> At the same time, India's efforts to push BIMSTEC (Bay of Bengal Initiative for Multi-Sectoral Technical and Economic Cooperation) over SAARC have been largely unsuccessful due to lack of coordination and the exclusion of key South Asian countries (Pakistan, Afghanistan, Maldives).<sup>64</sup> Outside the SAARC region, Pakistan's growing ties with new Central Asian energy powerhouses such as Azerbaijan, high-level diplomacy with Uzbekistan and Kazakhstan also impact the state of play in the region, especially with growing interest in Islamabad's regional connectivity model for becoming a transit hub between China, Central Asia and the Middle East.<sup>65</sup> After years of lukewarm ties with Iran, which had pivoted to India, Pakistan's ties with Tehran are also going through a visible improvement. Pakistan's principled position on supporting Tehran against attacks from Israel, which is a core Indian ally, have definitely led to a reappraisal by Iran on its ties with New Delhi, despite cooperation on Chahbahar and International North-South Transport Corridor (INSTC).



Source: Iranian Presidency

With Afghanistan, where Indian attempts to use terrain for covert action against Pakistan are legion, New Delhi's most recent attempts at rebuilding ties with post-Taliban Kabul are based on reducing space for Pakistan, not on its historic rejection of religious-based dispensations. Breaking with the traditional Indian posture of avoiding contact with the Taliban, India Foreign Minister S. Jaishankar called his Afghan counterpart Amir Muttaqi in May 2025, to commend his condemnation of the Pahalgam attack.<sup>66</sup> In the UNGA Resolution on the Situation in Afghanistan (A/79/L.100) of July 2025 too, India abstained from urging the Afghan Interim government from upholding human rights, adhering to international law, and taking decisive action against terrorism.<sup>67</sup> Sensing the diplomatic rise of the Taliban across the region, especially with Russia's recognition of their government, the Indian establishment is scrambling to curry favour with a Taliban government it now sees in intermittent trouble with Pakistan over the issue of TTP sanctuaries. Yet the Indian reversal has already met with limits. While Islamabad and Kabul have many challenges to collectively resolve, the geographical contiguity of the two countries remain a key incentive for both to continue to navigate past triggers for tensions. Recent meetings with Pakistan's Foreign Minister in July suggest that the Taliban will hedge their regional calculus with a view to prioritising crucial aid access, economic and transit trade options for which Pakistan is still irreplaceable, as the preferred norm.<sup>68</sup> Despite tensions between Kabul and Islamabad over border spillovers of militant violence, both countries have reset diplomatic ties by upgrading to ambassador level, while moving security, trade, transit and refugee issues onto a broader agenda of engagement. Unlike India, which seeks to keep tensions on the boil with Pakistan, the latter looks to solving core issues with Afghanistan like terrorism by different levels of engagement.

Part of the international dial-down in empathy for India was on account of its recorded trans-national terrorism in countries like Canada, as well as the United States, but even for allies firmly wedded to the Israel-India nexus, the credibility gap on intelligence and information shared by India as a justification for Operation Sindoor was a

stretch too far, as was the unprecedented Indian recourse to weaponisation of water with Pakistan. To its immense chagrin, nobody really came to India's support after witnessing its unprovoked attack, and escalation with a nuclear armed adversary.<sup>69</sup> The implications of strategic irresponsibility in a contiguous conflict theatre that has seen many wars reinforced the Indian posture as immature and narrative-driven.

India's growing rejection of multilateral rules, including UN guardrails against pre-emptive state violence, and the fact-free environment it has sought to bolster for state belligerence also impacted its reception at the multilateral forums it has invested in over the last few decades.

At the SCO's Defence Ministers' Meeting in June 2025, Indian diplomats wanted a stronger stance against terrorism, which other members did not endorse. The draft statement did not include mention of Pahalgam, but did include Balochistan. India's refusal to sign the statement, citing a dilution of its stance on terror, resulted in no official statement being issued after the moot. The Indian defence minister stated that "some countries use cross-border terrorism as an instrument of policy", and that its concerns on terrorism could not be included in the final document due to the objections of "one particular country".<sup>70</sup> India's hyper-exclusive framing of terrorism had few takers at the SCO. The QUAD joint statement from July 2025 in response to the Pahalgam terror attack serves as another example. While members condemned the attack in principle, its diplomatic wording - notably avoided any mention of Pakistan and referring vaguely to "relevant authorities" - aligned more with Pakistan's longstanding demand for an impartial international investigation, rather than an endorsement of India's claims. The diplomatic silence surrounding India's allegations confirm the writing on the wall: New Delhi's narrative is failing to resonate globally.<sup>71</sup>

As Pakistan made a bid for membership into BRICS supported by Russia, the 17<sup>th</sup> BRICS Summit in July 2025 condemned terror in Pahalgam, but did not mention Pakistan. Indian media widely commented on this 'lapse' as proof of decreasing Indian influence. India's own strategic position is unable to hedge its relationship with the U.S. and other forums, losing its putative attempts at authentic leadership of the Global South, or even navigate multipolarity, citing lack of economic alignment at the BRICS forum. While concerns over Beijing's dominance have led it away from exercising options in Asian forums, at the most recent SCO moot in July 2025, Indian FM Jaishankar attempted to take a conciliatory tone with China, in an obvious bid to make up for the loss of diplomatic capital.

In a world driven more by transaction than multilateral order, New Delhi's beggar-thy-neighbour approach may have had its takers, but for the current moment that is not the case. The Indian assertion that Pakistani arms purchases spike every time it receives a loan from the International Monetary Fund found little purchase as the IMF went ahead to push out a \$7 billion programme in 2024 to Pakistan with a new \$1.4 billion arrangement in 2025 under a climate resilience fund.<sup>72</sup> At a press conference in Washington in July, IMF Director of Communications Julie Kozack said Pakistan had met all of its targets while making progress on reforms, which led the board to approve the programme last year.<sup>73</sup> Similarly, the Financial Action Task Force (FATF) also ignored India's attempts to have Islamabad placed on the watchdog's grey list.<sup>74</sup> A long trendline of India blocking, delaying or preventing multilateral support to Pakistan has intensified in the combative diplomacy the Modi regime has adopted as policy, but it has not worked this time.

For Islamabad, the shift is palpable. After receiving broad support in the UN General Assembly vote of June 2024 (to elect UNSC non-permanent members for the 2025-26 term) in July 2025, Pakistan assumed a month-long presidency of the United Nations Security Council where Pakistan secured 182 of 193 votes, leaving many in India expressing displeasure over the Vishwaguru's (Modi's self-styled avatar) inability to affect outcomes at apex global forums.<sup>75</sup> Concurrently with the UNSC presidency, Pakistan has also taken up chairmanship of the Taliban Sanctions Committee, and is also vice-chairing the UN Counter Terrorism Committee.<sup>76</sup> The listing of the "Resistance Front" by the United States as linked to LeT is no cause for celebration, because both outfits should find no support in today's Pakistan. Instead, Islamabad's ask for listing of Majeed Brigade as a terrorist outfit, with clear backing from India, is also on the table.

# THE THREE CRISIS TRIGGERS

## Weaponisation of Water

Part of the ‘new abnormal’ that Modi is trying to establish is the unprecedented use of water as a weapon. This will keep the region in a perpetual state of volatility for more than one reason. Intra-state water treaties like the Indus Waters Treaty are never broken by one side, and cannot in fact be put in “abeyance” in any sense of the word, both legally and in practice. India’s use of the term abeyance to juggle past the termination clause of the treaty which does not allow any one side to unilaterally exit the treaty has been exposed in the recent award by the Permanent Court of Arbitration at the Hague.<sup>77</sup> The court of arbitration has maintained in their recent verdict that India cannot unilaterally terminate the treaty or hold it in abeyance.<sup>78</sup> At another level India’s suspension of such a treaty has grave implications for all transboundary sites of conflict as well as water-sharing conventions and agreements. Today, 153 countries that share 286 transboundary rivers, and 592 aquifer basins, have cause for anxiety after such a precedent is allowed to be normalised by rule-flouting India.<sup>79</sup>



Source: Policy Wire

The treaty that Indian PM Modi wants to suspend was mediated by the World Bank and essentially partitions the water of six rivers between the two countries where it has stood the test of several wars. In fact, over the last two years, the Modi regime has repeatedly spoken of water as a weapon, while simultaneously trying to render the treaty inoperative by blocking the meetings of the Permanent Indus Commission, where data about water flows is shared by both sides.<sup>80</sup>

Modi's desire to weaponise water, a basic human necessity, was first articulated as early as 2016, when he threw the gauntlet by saying that "blood and water cannot flow together", linking Pakistan's right to water with terrorism.<sup>81</sup> Over the past decade, and more vociferously during the last two years, India has been actively seeking ways of exiting the treaty using Pahalgam and terrorism as an excuse, providing a convenient pretext for illegally stopping implementation. India's inconsistency in its own arguments on the Indus Water Treaty betrays its true strategic objectives in holding the treaty in abeyance. In its public messaging and in its notices to Pakistan it has alternately claimed that the parallel dispute resolution mechanisms is a hindrance to treaty implementation or that changing ecological and climate conditions necessitate a renegotiation of the treaty, and more recently it has linked the continued implementation of the treaty with arguments linking water with terrorism.<sup>82</sup>

Evidence of India's actions against Pakistan on water also surfaced most crucially in 2016, when PM Modi not only introduced his new doctrinal abnormal by stating that "blood and water cannot flow together", he also set up a Task Force to maximise "utilisation" of India's rights under the IWT.<sup>83</sup> The Task Force prioritised eight large hydropower projects on the Chenab whose power generation capacity is over 6000 MWs, whereas the total capacity of 30 hydropower plants built since the 1970s is 3478 MWs.<sup>84</sup> However, all the priority plants featured are run-of-the river projects, their massive pondage capacity definitely exceeds the maximum quantity allowed for all Indian uses of western river flows (3.6 Million Acre Feet).<sup>85</sup> The fact of the matter is that India has already used up almost three quarters of the water allowed for the pondage of the built and operational plants.

To avoid such questions, the mandatory meetings that share data between the countries have been suspended. While Indian motives for resilement from Treaty obligations were evident for the last three years, as New Delhi ceased communication on water data; engagement on Treaty observations, mandatory queries and formal exchanges were ongoing from the Pakistani side, even when India declared that it will unilaterally cease all communication and cooperation on a treaty it is obligated to observe. All letters and communications sent even in proforma mode by India, were all responded to. In fact, India's suspension of the treaty was announced while water diplomacy was ongoing between the two countries.

In reality, the growing water scarcity faced by Indian states of Punjab, Haryana and Rajasthan, along with occupied Jammu, has resulted in India coveting Pakistan's share of the Indus rivers in the long run. This has been perpetuated by estimates that South Asia's water resources will shrink by 20 per cent by 2050, creating a serious water crisis for one of the world's most populous regions. In a recent statement, India's Home Minister, Amit Shah has said "India will never restore IWT with Pakistan" even as he announced the building of 113 km canal on western rivers allocated to Pakistan to divert water flows from Chenab towards Jammu, Punjab, and eventually Rajasthan within the next three years.

The Indus River System is the backbone of Pakistan's agriculture, and supports in one way or another 90 per cent of the livelihoods associated with food security.<sup>86</sup> The Indus is also the lifeline of the country's water and hydro-energy resources, with a shared basin with India that spans the size of England. As the largest miner of groundwater in the world, India has already sapped the basin's aquifers of sweet water. Yet instead of going into water and climate dialogue with other riparians and regions, Modi's new doctrine of perpetual war seeks to add land hunger, food and water famines to a region already stressed by deepening water scarcity, pollution and climate-induced depletions. The farmer destitution in India itself has led to conflicts and suicides within the country.

For Pakistan the impacts of any interruptions in water flows are obvious and existential. There is also no ambiguity expressed across the board in Pakistan about India's threats to stop or change water flows for geopolitical ends is unacceptable. In its first reaction to India's decision, Pakistan's National Security Committee has unequivocally declared that any attempt to stop or divert water will be considered an Act of War. At the same time, Islamabad's position has gained moral strength with the Permanent Court of Arbitration's verdict at The Hague in Pakistan's favour. The Court not only invalidated India's claim, but also affirmed that India's Kishenganga and Ratle hydropower projects on the Western rivers must comply with the Treaty's technical requirements and other safeguards.

In the region, India's moves against the IWT have also increased the existing vulnerabilities of Nepal and Bangladesh which share river flows with India as upper riparian and lower riparian respectively. Bangladesh's 54 rivers, apart from Ganga, flow downstream from India. There is an ominous sense of escalated conflict not just between India and Pakistan but also between other transboundary riparians in the South and East Asia region, which is defined by growing water scarcity and enhanced heat impacts on food security as an outcome of climate change. India is adding fuel to this flammable mix.

## Terrorism or Dog Whistle?

The central question to be asked here is not a comfortable one. Is India really looking for solving its terrorism problem, or is it principally focused on instrumentalising it as a dog-whistle to demonise Pakistan, and now even to breach the country's sovereignty while dallying with a possibility of catastrophic consequences? While it is clear that no trajectory or path to CT is ever free of distrust of key players or partners, partnerships are still the cornerstone of effective CT play, especially in unlocking the hide-outs, both virtual and territorial, that terrorists today use in their cross-border movements. The Indian refusal to use joint CT tools and frameworks to flush out non-state terror actors suggests that the politics of calling out Pakistan as a perpetrator of proxies is more seductive to New Delhi as an option than an actual targeting and capture of such targets. The U.S. Centcom Chief's recent assertion of Pakistan being a "phenomenal partner"<sup>87</sup> in fighting terrorism may have rattled New Delhi's narrative, but it has not given any incentive to Indian officials to push for joint solutions or frameworks to combat terror in the region. Despite the scale of divergent threat perceptions, Pakistan's offers of cooperating on a joint institutional protocol for hunting down the targets identified by either or both states at any forensic, physical and prosecutorial level have been unequivocally refused.



Source: AFP File Photo

Today, when Pakistan is fighting alone after a decade of partnering with NATO on the border of Afghanistan, it has at different points managed to take credible and verifiable actions in the region against IKS, and earlier Al Qaeda as well, while the Indian strategy is to ramp up the proxy war by actively funding the fighting in Pakistan's Balochistan and Khyber Pakhtunkhwa. There is a strong view in Islamabad that the Indian covert war initiative, both in Balochistan and Afghanistan, seeks to encircle Pakistan in a 'velvet ring' of blood and terror, most recently on display in Balochistan. During the recent stand-off between Pakistan and India, a surge in terrorist attacks in Balochistan was reported, with BLA openly supporting Indian attacks.<sup>88</sup> Investigations have found BLA links

with Daesh in Afghanistan, with active triangulation between Indian sources and the Jamaat ul Ahrar outfit as well. Groups like Majid Brigade regularly claim responsibility for attacks, in coordination with BLA, whose links with Indian intelligence have been shared with the UN, as well as acclaimed on Indian TV channels as grist for celebration, while the attacks are underway. Pakistan's own diplomatic diffidence is to be blamed here for not reminding the world that the largest train hijack in the world, the Jaffar Express bombing in Balochistan, points clearly to Indian actions. It was no small coincidence that a previous PM of India, Manmohan Singh, had even agreed to include Islamabad's ask of stopping Indian interference in Balochistan in a joint communique with Pakistan's PM, Yusuf Raza Gilani at a meeting in July 2009, on the sidelines of a Non-Aligned Movement summit in Egypt.<sup>89</sup>

Part of the reason why the Indian narrative of beating Pakistan with an old stick no longer washes with key offices in the multilateral community is that forensic evidence of Indian terrorist facilitation has been shared with the UN, which includes the arrest of a serving Indian military officer in the middle of a classic red-handed case of covert action in Balochistan. The said officer, Kulbhushan Jadhav is still in Pakistan's custody.<sup>90</sup>

If Pakistan were to bring South Asia to the boil every time terror struck in Pakistan or when joint investigations were shut down by India when the dots connected to internal Indian sources by their own investigation agencies, such as the infamous Samjhauta Express massacre of 40 Pakistanis in 2007, the region would tip over into a war zone with no end. India's strategy ignores the costs of provocation in a landscape already scarred by extremism. It also ignores the fact that Pakistan's counterterror operations have evolved significantly since the era of Zarb-e-Azb and Radd-ul-Fasaad.

The current narrative being advanced by New Delhi is not just misleading, but also incapable of managing the unintended consequences it is inviting. The constant refrain on Jaish-e-Mohammed and LeT deliberately ignores the fact that all such outfits listed at the UN have been dismantled, with 900 physical properties taken over by the state, over 80 organisations proscribed, and leaders put in jail.<sup>91</sup> The founder of LeT has been awarded 31 years in prison for terror financing.<sup>92</sup> Despite positive verifications by UN monitoring teams in favour of Islamabad at international forums, there is no willingness or intent from India to fight regional terrorism through any joint mechanisms that offer a minimum level of transparency. Instead, New Delhi continues with an aggressive labelling strategy to put Pakistan on the defensive.

The most dangerous part of the doctrine is linked to terrorist attacks as *casus belli*, or cause for war. If terrorists with no verifiable links to Pakistan, such as those in the Pahalgam attack, are trumped up as sponsored by Pakistan, as a trigger for a full-on war, then everyone, not just South Asia, has cause to worry. Pahalgam is located in the internationally disputed territory of Kashmir, which is illegally occupied by New Delhi – a fact Indian officials at the UN did not want to acknowledge. Since 2019, it has become, other than Gaza, the world's largest open prison of locals who resist the genocide New Delhi has unleashed on them.<sup>93</sup> The area remains one of the world's most militarised. More than two months since the Pahalgam attack and after India having fought a four-day near-war, India's vast security web in Indian Illegally Occupied Jammu and Kashmir has been unable to locate those responsible for the attack. Even more damning for India is a recent press statement by India's National Investigation Agency (NIA), tasked with investigating the Pahalgam incident, which has announced that "evidence is still being processed" and that "no conclusion has been reached" in the Pahalgam attack.<sup>94</sup>

It has also not gone entirely unnoticed by the international community that Pakistan's Prime Minister made an immediate offer of a neutral investigation into the attack which was spurned by India, leading many to wonder which government had what to hide in the whole sorry episode.<sup>95</sup> Islamabad's offer for working jointly on counter-terrorism, whether related to the Afghan space which India is keen to exploit in its recent sponsorship of the 'Kashmir TTP', or the evidence submitted to the United Nations by Pakistan on the trail of Indian proxy operations in Pakistan, is not taken up by the hard-core Modi establishment which uses smoke and mirrors to build a narrative on Pakistan as a fomenter of terrorism.

A clear example is the selective citation of FATF actions 'against' Pakistan released by the Indian media in its broad

demonisation project.<sup>96</sup> The reality here too is far from the facts. Quite to the contrary, at multilateral counter-terrorism financing bodies like the FATF, where the scrutiny is certainly not sloppy, Pakistan recently has been commended for its actions and compliance of CT financing doorstops, while India has been unable to provide evidence or even cite the Pahalgam incident as an example of Pakistan's alleged complicity.

## The Kashmir Dispute

Kashmir continues to absorb the heaviest cost of the India–Pakistan conflict. The region remains caught in the crosshairs of bullets, shells – and now drones. Since 2019, over 700 incidents have been reported, claiming the lives of at least 277 soldiers and 212 civilians.<sup>97</sup> The violence has become routine, and Kashmiris are left to pay the price of every diplomatic rupture and military flare-up. The refusal to acknowledge Kashmiri agency remains the conflict's most destabilising feature. There is little realisation in Modi's core cabinet that Kashmir's future cannot be shaped through constitutional sleight or unilateral executive action. Growing evidence of Kashmiri discontent on the ground is ignored. Extreme measures like the Modi government's 2019 decision to revoke Article 370 have also failed to extinguish the call for self-determination.<sup>98</sup> At the same time, millions of Kashmiris have been disenfranchised by denying them statehood, redrawn electoral maps and new domicile laws that aim to shift the region's demographic makeup. The latter was the motive behind removing Article 35-A from the Indian Constitution in 2019, to disable the local legislature to define who are permanent residents of the state, and remove the special privileges given to (Occupied) Jammu and Kashmir by the Indian state in 1954.



Source: Flickr / Kashmir Global

The Modi regime's ultranationalism has also reconfigured India's external posture. With a model of domestic legitimacy anchored in majoritarian nationalism, foreign policy has become an extension-project of constant internal consolidation. Kashmiri Muslims, who are very conscious of their political rights in an area declared disputed by the United Nations, for instance, are subject to surveillance, silence and discrimination. Protest is criminalised, religious practice curtailed, and civic space systematically eroded.<sup>99</sup> A project once presented as integration has revealed itself as occupation, both administratively and militarily, while a systematic attack on Kashmiri identity is ongoing through change in historical names, targeting language and traditions. Collective punishment along the lines of the West Bank is the norm. Homes and entire neighbourhoods are turned to rubble on the mere suspicion of a family member harbouring sympathies for self-determination. Even Indian civil society members who have long worked on Kashmir caution against the government's narrative of development and normalisation, arguing that the Kashmiris may be silent but have become irrevocably disillusioned with the idea of an India where their cultural and religious identity is threatened, and their political rights ignored. The majority

is very clear: as long as Kashmir is denied representation and the freedom to speak, regional peace will remain beyond reach. No normalisation effort can succeed without the inclusion of Kashmiri voices.

Unfortunately, the very real message in Kashmir's silent resistance is falling on deaf ears. The approach on Raisina Hill is to dangle the carrot of eventual restoration of statehood in a bifurcated Jammu and Kashmir to keep pro-India politicians in humour. In reality though, Kashmir has been stripped of any vestige of political authority with even pro-India leadership sidelined in security, policing and government postings with the Lieutenant Governor acting as viceroy for New Delhi. While Modi's government continues to deny the Kashmir problem at home, the sum total of India's Kashmir policy externally is for its leadership to continue making empty threats against Azad Kashmir and Gilgit-Baltistan, blame indigenous resistance on Pakistan, deny that Kashmir is even a dispute when confronted internationally, and repeatedly refuse dialogue over Kashmir. India's approach to Kashmir privileges hegemonic, violent unilateralism over recognition of the facts on the ground which necessitate diplomacy.

The possible outcomes of India's approach towards Kashmir are not hard to map. With continuing crackdowns, repression and denial of political rights, the indigenous resistance will only grow. As Kashmir's history attests, all it takes is a trigger for the streets to erupt again in slogans of 'Azadi'. The denial of Kashmir's reality as a dispute with four parties; Kashmiris, Pakistan, India and China cannot be wished away by an ideologically motivated regime in New Delhi that seeks to demographically cleanse the area of its traditional Muslim majority. Perhaps an uncomfortable reality check for South Block has been President Trump's reference to the Kashmir dispute and his willingness to mediate.<sup>100</sup> Even though the statement does not reflect any strategic shift in U.S. policy on Kashmir, it does throw cold water on thirty years of Indian diplomacy which had tried to keep the word Kashmir off the global map and assiduously guard against any mention of third-party mediation. This alone should be a signal to New Delhi that it will never succeed in its attempts to recraft the reality on Kashmir through rhetoric, unilateralism and repression.

Former President Bill Clinton was not wrong when he said that Kashmir was the world's most dangerous flashpoint.<sup>101</sup>

# THE ARC OF NUCLEAR RISK

Strategic drift under a nuclear overhang is not an option for countries on the brink. India and Pakistan possess roughly equal nuclear arsenals.<sup>102</sup> India completed its nuclear triad in 2018, enhancing its second-strike capability across land, air and sea. Pakistan too has announced a limited strategic capability at sea. This theoretically strengthens deterrence, but the reality on the ground tells a different story. The 2019 Balakot air strikes marked a significant departure from traditional restraint: India engaged in conventional military retaliation below the nuclear threshold, yet raised tensions dramatically. This action, met with muted international response, effectively lowered the threshold for escalation and signalled a willingness to challenge established deterrence norms.



Source: Hindustan Times / AFP File Photo

Though India maintains a declared No First Use policy, recent statements from senior officials have introduced ambiguity, undermining the predictability essential to deterrence stability. When strategic signalling edges into calculated escalation, deterrence risks transforming into dominance, increasing instability rather than reducing it. The potential human cost of such instability is catastrophic. A limited nuclear exchange in South Asia could cause approximately 20 million immediate deaths within a week.<sup>103</sup> Beyond that, a full-scale nuclear conflict risks triggering a nuclear winter that would threaten nearly two billion people, predominantly in the developing world, with famine and societal collapse. These projections are grounded in current warhead inventories, delivery systems, and regional fault lines. New Delhi's strategic posture is marked by advances in sea-based deterrents, anti-ballistic missile defence and emerging space capabilities, signalling a push toward escalation dominance rather than measured deterrence.

Given the very real risks involved in a nuclear environment, India has consistently taken actions to lower the threshold for war. It has done so by removing the psychological barrier that exists between two nuclear states which prevents each side from undertaking escalatory attacks. Now that India, and Pakistan in retaliation, have struck each other's airbases, military installations and cities, both sides will find it easier to start the next round at a higher rung on the escalation ladder. Secondly, and perhaps more fundamentally, India has signalled that it does not consider the risk of nuclear war a real risk. This should be disturbing for the world at large. Never before has one nuclear power alleged that another nuclear adversary is indulging in 'nuclear blackmail', the assumption being that India will push the escalation threshold without care for nuclear risk.<sup>104</sup> Needless to say, New Delhi's assumptions on this front are incorrect. Pakistan has, on more than one occasion, signalled its clear red-lines for strategic stability. Ignoring them would be unwise.

This abnormal deterrence posture operates in a context of frozen communication channels and a lack of effective crisis management mechanisms between the two powers. Without clear red lines or reliable diplomacy, the probability of miscalculation escalates sharply. The nuclear overhang in South Asia remains one of the most acute threats to regional and global security, shaped by India's aggressive strategic signalling, and attempts at escalation dominance. The use of UAVs and precision strikes has also changed the texture of escalation. The current cycle reaches new heights with each round, but what is alarming is the baseline it sets for the future.

Given the nuclear overhang, the potential risk, even if remote, of sleepwalking into the unthinkable realm of nuclear conflict is obviously very real. The new Indian embrace of risk amid new and old triggers for conflict suggest that the Indian establishment is spoiling for a fight, and will drag South Asia down with it. In case of a return to conflict, the current restricted communications baseline and tactical infrastructure will not be enough to manage escalation in a compressed time envelope. The emphasis on narrative-building at the expense of facts that change the suite of options available to either country suggest that New Delhi is waiting to regroup, recalibrate and act.

# CONCLUSION

The strategic abnormal that Modi and his cohort are trying to impose on the region is neither sustainable nor mature. Essentially, Prime Minister Modi's announcement that Operation Sindoor represents the "new normal" signals a deliberate hardening of India's strategic posture. This shift presumes culpability without evidence, bypasses due process, and substitutes political theatre for intelligence work. There should be no doubt in anyone's mind that the conflict threshold between the two countries has been lowered, and political hostility is high. In this model, the risk of war is compounded, with Indian PM Modi's broadcasting the ceasefire as a 'pause'.<sup>105</sup> The motive appears to be more domestic than strategic, with Modi using an external threat to bolster a potential blunting of his political edge. This compulsion seems as much tied to the anniversary of the RSS and an internal BJP challenge to Modi's own retirement age, as a Bihar election in the winter.

The introduction of a new water contingency that could further expand the scale of crisis by layering on a new trigger for kinetic responses between the two is not to be dismissed. There is a strong view among the strategic community in Pakistan that while the ceasefire may hold, in the medium term, the space for engagement and dialogue for peace may not expand despite calls from the international community. The reasoning behind this presumes the Modi kitchen cabinet's continued belligerence, assertion of canard as fact, as in NSA Doval's post-war announcement, and the need to mute the stakeholders contesting this narrative. Conventional strategic wisdom also suggests that in the absence of conflict prevention measures, active conflict-renewal is only a matter of time. If New Delhi begins the next episode where it ended this one or on a higher rung, the risks of uncontrollable escalation multiply. None of this supports regional stability.

With only a contested political narrative to sustain its decision-making motive as well as outcome, New Delhi has lost more than it has gained. The most dangerous part of this manufactured new abnormal is that New Delhi now blurs the line between state responsibility and non-state actors, conflating militancy with foreign policy. This logic rewards escalation and penalises restraint. With disinformation campaigns featuring as a central hub of the state's toolkit, manufactured trends are broadcast early and relentlessly, often before facts are established. AI-generated content and unverified claims dominate news cycles, especially during crises. The result is a degraded information environment where perception trumps reality. These conditions favour speed over accuracy and political payoff over diplomatic caution. The space for dialogue narrows further each time this model is repeated.

The May 2025 conflict with Pakistan has not only enhanced faultlines in India's coercive diplomacy in the region, but also exposed limits of its national power as potential net security provider to the USA in a fragmented global system. The risk-prone behaviour of its strategic elites, investment in conflict instead of co-existence as a model for engaging with peer-competitors or even smaller neighbours has dimmed its geopolitical shine as a potential leader even in the South Asian region. Its refusal to shed a theory of caricaturing Pakistan as a compulsive exporter of terror is no longer holding water in several multilateral forums, including FATF, where both countries' approaches are fundamentally divergent. Islamabad's most recent actions in its report, like its actions at home, are based on verifiable intelligence, citing the National Counterterrorism Authority on TTP, IS-K actions, while India has used only two case studies, being unable or unwilling to cite or reference the Pahalgam incident.<sup>106</sup>

Unlike India, which has managed to alienate several erstwhile regional friends in the region, Pakistan's capacity to operate as net balancer in the region is not materially constrained by its strong relationship with the Peoples Republic of China, which has been a political, strategic and economic anchor of support in the greater Asia-Pacific, but also the world. Given that Beijing's decision-making is never predicated on impulse or short-term gain, it remains committed to Pakistan in a strong relationship of mutual trust, while its geopolitical vision of power rests on connectivity, economic growth and "indivisible security" and peace. Islamabad's challenges to enhancing national power are constrained not by geopolitical binaries or zero-sum choices, but by an internal structural reform lag that slows growth options in an increasingly connected, yet strategically decoupled world. While President Trump's re-hyphenation of Pakistan and India is cause for chagrin to New Delhi, just the very mention in White House discourse of Kashmir as an international dispute instead of a bilateral or internal matter for India, is a setback for India's ahistorical diplomacy on the dispute. The business of mediation, which is based on the Indian world-view of sole decoder of international law in the region, has also thrown some cold water on an overheated self-image of Indian Ocean hegemon. While Indian partnerships in the Asia-Pacific region may well push it over this diplomatic hump, there is little doubt that the South Asian strategic environment will not quite be the same again for some time.

Pakistan obviously sees any beginnings of diplomatic normalisation and dialogue resumption with India as linked to New Delhi putting an end to its politically toxic rhetoric. Despite its early and decisive air combat wins in the unprovoked conflict with India, Pakistan has messaged both its willingness to engage in dialogue on all bilateral stressors between the two, not as a concession to buying space to address internal challenges, but as the only real option for meeting common challenges. Yet New Delhi, at this point of Modi-brand muscularity, remains boxed in its narrative trap of not "negotiating with a gun to its head."

Pakistan's red lines have been re-asserted to include all attacks on its water sources and territorial sovereignty as non-negotiable. The path to resuming a formal composite dialogue with India, on terrorism, water, Kashmir, all naturally presume one key shift in the current Indian position. While the prevention of catastrophic conflict remains Islamabad's first priority, it is clear that dialogue or vital diplomatic channels cannot be resumed in an atmosphere of war-provoking aggression and chronic distrust. Formal, sign-posted bilateral dialogue can only be meaningful once the political space is created for it. Pakistan has publicly said it is open for business, but all much-needed talks will only end in tears if there is no change in Modi's mindset or a regime-change in New Delhi.

This means that Islamabad will not respond with inaction to terror, to coercive diplomacy or attacks on its sovereignty. The tea served to the downed Indian pilot Abhinandan from the 'punitive' Indian strike in Balakot 2019, will always be available, along with courtesy.

# Timeline of Events: April–May 2025



## April 22, 2025

- 26 civilians are killed in Indian-administered Kashmir. No arrests or search operations follow, a break from past security responses.
- PM Modi condemns the attack on X and vows justice, reaffirming India's strong anti-terror resolve.



## April 23, 2025

- India does not blame Pakistan but announces retaliatory measures: suspends the Indus Water Treaty, closes the Attari Border, cancels visa privileges and expels defence staff.
- MOFA expresses concern over the loss of tourist lives in Anantnag, and offers condolences to victims' families.



## April 24, 2025

- Addressing a rally in Bihar state, the Indian prime minister said India will pursue the Pahalgam attackers “to the ends of the Earth.”



## May 7, 2025

- India launches air and missile strikes on nine locations inside Pakistan, claiming it was targeting “cross-border terror infrastructure.”
- DG ISPR Lt. Gen. Ahmed Sharif Chaudhry confirms 26 civilians were martyred and 46 others injured, including women and children.
- Pakistan Air Force shot down 6 Indian aircraft attempting to retreat. Video evidence from Indian Punjab and Jammu confirmed aircraft wreckage.
- On the morning of May 7, India's DGMO contacted Pakistan's DGMO. Pakistan deferred the conversation, stating they would respond after their retaliation.



## May 8, 2025

- India alleges that Pakistan launched drones and missiles into Jammu and Amritsar. No wreckage or verified footage of Pakistani drones was produced.
- India conducts drone strikes, hitting Pakistan's radar infrastructure, including a radar site near Lahore.
- India blocks 8000 X (Twitter) accounts, including those of Reuters, TRT World, Anadolu Agency, and instructs dailies The Hindu and The Wire to remove stories.



## May 9, 2025

- India strikes three Pakistani sites: Nur Khan Airbase (Rawalpindi), Muridke (Chakwal), and Shorkot Airbase (Jhang).
- Pakistan Launches Operation Bunyan um Marsoos with missiles and drones at 36 locations in India, using Fatah-1 and Fatah-2 rockets, long-range artillery, loitering munitions, and air-launched cruise missiles.



## May 10, 2025

- India conducts further strikes using BrahMos cruise missiles and air-launched cruise missiles on 5–6 Pakistani airbases, injuring 5 soldiers at Bholari airbase.
- Pakistan targets Indian Air Force and Aviation bases at Suratgarh, Sirsa, Bhuj, Naliya, Adampur, Bhatinda, Barnala, Halwara, Awantipura, Srinagar, Jammu, Udhampur, Mamun, Ambala, and Pathankot. BrahMos storage facilities at Beas and Nagrota, and S-400 battery systems at Adampur and Bhuj are destroyed.
- India states it would not escalate further if Pakistan refrained from more retaliation.
- U.S. Secretary of State Marco Rubio speaks to Pakistan's COAS.
- U.S. Vice President JD Vance speaks to PM Modi over a telephone call.
- Pakistan's DGMO speaks to his Indian counterpart post-Operation Bunyanum Marsoos.
- India's Foreign Secretary states that both sides agreed to end hostilities. Pakistan did not issue an official statement at that time.



### Global Reactions:

- Secretary Rubio tweeted calling for restraint.
- US President Trump tweeted congratulating both sides on de-escalation.
- PM Shehbaz Sharif thanked Trump in a subsequent tweet.

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