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Pakistan in Perspective: A Post-Operation Sindoor Analysis

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Editors



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Contents

Editors' Note	4
I Domestic Developments	7
The Persistent Challenges to Development in Pakistan <i>Aparna Pande</i>	8
The Inherent Fragility of Pakistan's Hybrid Political System <i>Sushant Sareen</i>	13
Default, Dollars, and Dilemmas: Assessing Pakistan's Economic Gamble <i>Soumya Bhowmick</i>	17
Decoding Pakistan's Media Landscape <i>Soumya Awasthi</i>	23
The Baloch Insurgency: Tactics, Expansion, and Regional Fallout <i>Shakoor Ahmad</i>	27
II Military and Civil-Military Ties	32
Civil-Military Relations in Pakistan: Conflict, Continuity, and Change <i>Rana Banerji</i>	33
The Pakistan Army: Modernisation and Doctrinal Thought <i>D. S. Hooda</i>	39
A Capacity and Capability Assessment of the Pakistan Navy <i>Sarabjeet S Parmar</i>	43
Fiza'Ya: The Myth and Reality of the Pakistan Air Force <i>Diptendu Choudhury</i>	47
Pakistan's Nuclear Strategy of Deterrence Through Brinkmanship <i>Manpreet Sethi</i>	52

III	External Relations	56
	The Strategic Foundations of Pakistan-China Relations	57
	<i>Sana Hashmi</i>	
	Understanding the Upswing in U.S.-Pakistan Relations	61
	<i>Husain Haqqani</i>	
	Preferences and Paradoxes in EU-Pakistan Ties	65
	<i>Shairee Malhotra</i>	
	The Paradoxical Relationship: Three Motives for Russia's Courtship of Pakistan	69
	<i>Aleksei Zakharov</i>	
	Pakistan's South Asia Gambit Post-Operation Sindoor	74
	<i>Shivam Shekhawat</i>	

Editors' Note

Pakistan's Deputy Prime Minister and Foreign Minister, Ishaq Dar, met United States (US) Secretary of State Marco Rubio on 29 May 2026 during an official visit to Washington. In a statement released by Pakistan's Foreign Affairs ministry after the meeting, the US Secretary of State acknowledged Islamabad's effort at mediating the ongoing conflict in the Middle East and reiterated the US's commitment to expand cooperation in trade and investment with Pakistan.^a

In the past year, Pakistan has been attempting to push a "victory" narrative addressed to both its domestic constituents as well as external observers. Such strategic messaging from Islamabad covers Operation Sindoor—during the campaign itself and in its aftermath—as well as its mediatory role in the Middle East crisis which it is framing as a

diplomatic victory given its close relationship with all the parties involved.

For India, any degree of diplomatic and geopolitical relevance accorded to its neighbour and rival raises its threat perceptions. This special report, conceptualised after the India-Pakistan crisis of May 2025, offers an assessment of the key trends and developments within Pakistan, as well as of its dealings with its neighbours and other important partners, in the past year. The report is divided into three sections.

The articles in the first section discuss aspects related to Pakistan's internal social, economic, political, and security situation. It opens with *Aparna Pande's* chapter on the developmental challenges faced by Pakistan, including the gaps in human capital and economic growth. *Sushant*

a Ministry of Foreign Affairs-Pakistan (@ForeignOfficePk), "The Deputy Prime Minister/Foreign Minister, Senator Mohammad Ishaq Dar held a bilateral meeting today with the U.S. Secretary of State, Marco Rubio in Washington D.C.," X, May 29, 2026, <https://x.com/ForeignOfficePk/status/2060391794756796757>

Sareen then describes the state of the country's civilian government as well as the opposition, and the fragility of the hybrid political structure in place. Building up on this theme, *Soumya Bhowmick*, in his article, argues that Pakistan's economy will continue to remain dependent on external assistance unless it undertakes domestic reforms and utilises the relief offered by the bailouts to undertake overdue structural changes.

In the fourth chapter, *Soumya Awasthi* illuminates Pakistan's media landscape and describes how the state uses both digital and traditional media to reinforce its narratives, particularly in the context of its relations with India. In the final chapter of this section, *Shakoor Ahmad Wani* focuses on what is perhaps Pakistan's gravest internal challenge—the enduring insurgency in Balochistan, its transition to a more urban-centric nature, and its growing international visibility.

An underlying theme in the first section is the impact of the military's oversized role in the country's governance and its percolation into the political, economic, and social domains. To unpack this impact in detail, the second section begins with *Rana Banerji's* stocktaking of the civil-military dynamics in Pakistan, tracking the country's apparent grievances following the partition of the sub-continent in 1947 to the May 2023 anti-army agitation led by the Pakistan Tehreek-e-Insaf (PTI), while positing that the military dominance over the country will likely not diminish in the foreseeable future. The elevation of Asim Munir to Field Marshal in May 2025, and the subsequent passage of the 27th constitutional amendment in November has fundamentally altered the dynamics

amongst the three services of the armed forces. In his chapter on Pakistan's land forces, *D.S. Hooda* delves into the organisational structure, the modernisation efforts, and the doctrinal developments in the country's land forces, and their overtly 'India-centric' scaffolding. *Sarabjeet S. Parmar* then gives an account of the Pakistan Navy's capacity and capabilities in his chapter, its asymmetry with the Indian Navy, and its diplomatic role. *Diptendu Choudhury's* article reflects on the Pakistan Air Force's doctrinal and operational limits and how it navigates the predominance of the army as well as the PAF's performance during Operation Sindoor. *Manpreet Sethi* closes this section with a discussion of Pakistan's policy of deterrence through brinkmanship aimed at constraining India's conventional response in the face of a terrorist attack and magnifying the fear of a nuclear war.

The report pivots to its final section, which covers Pakistan's most critical external relationships. Following the May 2025 crisis, Pakistan was catapulted to a position of renewed diplomatic relevance. This has been a factor of both, the flux in the world order with the ongoing war in Iran and the return of the Trump administration in Washington, and the Pakistan military's growing role in the face of a weak civilian leadership. The authors bring a broad-based understanding of the two most important actors in Pakistan's calculations—the United States and China. Beginning with the 'all weather friendship' that Pakistan enjoys with China, *Sana Hashmi's* chapter discusses the strategic foundation of the relationship and its inherent vulnerabilities. *Husain Haqqani* follows with an analysis of the

recent upswing in US-Pakistan ties and the inherent transactional nature of the relationship.

Moving beyond these traditional actors, *Shairree Malhotra* and *Aleksei Zakharov* focus on, respectively, the European Union's and Russia's relationships with Pakistan and how the country fits in their regional worldviews. In the final chapter, *Shivam Shekhawat* analyses recent developments in Pakistan from a regional perspective, viewing the strategic gains that Islamabad had hoped to secure after the crisis last year and whether they indicate any structural transformation in its ties with the other South Asian countries.

It is the aim of this report to expand the readers' understanding of Pakistan at this juncture in the country's contemporary history, as it undergoes rapid transformations and sees an increasing consolidation of power by the military. Since the 2025 crisis and the overall instability in different parts of the world, it is a worthwhile and important endeavour to understand the developments within and outside Pakistan, and the impact they can have on the region and the rest of the world.

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I Domestic Developments

The Persistent Challenges to Development in Pakistan

Aparna Pande

Nearly seventy-nine years since it came into being, Pakistan stands at a critical juncture: it is nuclear-armed and has the world's twelfth largest military, but its economy is flailing, the society is polarised, and it has become an arena for contesting claims for national identity. With a young population of almost 260 million,¹ a labour force of 80 million,² and a median age of 20 years, Pakistan has immense potential to leverage its human capital and strategic location for economic growth. Instead, successive Pakistani governments have failed to invest in their people, turning the country's potential demographic dividend into a massive demographic challenge. The situation is compounded by the dominance of the Pakistani military, as well as longstanding fault lines within the country's society and political elite.

Low Human Development and High Gender Disparity

Pakistan's population has increased more than sevenfold since independence, and the country has the highest fertility rate in South Asia. It has one of the youngest populations in the world, characterised, however, by a low literacy rate. While the literacy rate among younger Pakistanis is higher than that of adults, the overall literacy rate has dropped to 60 percent in 2025 from 63 percent a year earlier.³

Male literacy rate stands at 68 percent while that for women hovers around 52 percent.⁴ There is an urban-rural divide, with the literacy rate in urban areas registered at 74 percent and in rural areas at a far lower 51 percent.⁵

The provincial disparity is also notable. According to the latest Pakistan Economic Survey, the literacy rate in Punjab is at 67 percent, followed by Sindh with 58 percent, Khyber Pakhtunkhwa at 51 percent, and Balochistan at 42 percent. In 2017, 61 million Pakistanis were not literate. Today, that number stands at 69 million.⁶

Pakistan also has the world's second largest out-of-school population. Approximately 44 percent of children between the ages of five and 16 do not go to school.⁷ According to data from the 2022-23 Economic Survey, the disparity among Pakistan's regions is stark: 47 percent of children were out of school in Baluchistan, followed by Sindh with 44 percent, Khyber Pakhtunkhwa (KP) at 32 percent, and Punjab with 24 percent.⁸ The gender disparity is also significant in terms of educational outcomes. In Balochistan, Pakistan's largest province by area, 78 percent of girls are out of school compared to 63 percent of boys.⁹ As of 2022, while male literacy in the country stood at 70 percent, the literacy rate for girls was a much lower 48 percent.¹⁰

At 23 percent, Pakistan has a very low rate of female workforce participation, compounded by societal, educational, and economic factors, including limited access to resources and cultural barriers against female advancement.¹¹ Lower rates of literacy among women often translate to a larger share of women's representation in the informal sector and in jobs that are vulnerable to economic shocks, such as farm labour and domestic service.¹² As is the case with girls' participation in education, a similar provincial disparity exists, with only 10 percent of women in Balochistan, Khyber Pakhtunkhwa, and Sindh

in the workforce, and primarily in the agrarian sector. With unequal access to education and the workforce, early marriages and early childbirth are common.¹³

Compared to its South Asian neighbours and peers in Asia and Africa, Pakistan lags in all areas of human development, not just in education.¹⁴ The UN Human Development Report continues to place Pakistan under the 'low human development category.'¹⁵ The country's public health spending stands at 1 percent of its GDP (Gross Domestic Product) and educational expenditure at 0.8 percent according to the latest Economic Survey.¹⁶ Pakistan ranks 168 out of 193 countries, and its Human Development Index score, a summary measure of achievement in key aspects of human development such as life expectancy and standard of living, has steadily declined over the last few years.¹⁷

Similarly, Pakistan ranks 145th out of 147 countries in the 2024 World Economic Forum's Global Gender Gap Index.¹⁸ It ranks 167th out of 170 on the Georgetown Institute for Women, Peace, and Security Index.¹⁹ Pakistan also has a high incidence of violence against women. Around one-third of women between the ages of 15 and 49 have experienced physical violence at some point in their lives.²⁰

Economic Challenges

Cities are often referred to as engines of wealth. Pakistan has the highest rate of urbanisation in South Asia; however, instead of boosting economic growth, it is only compounding the pre-existing challenges. With nearly half of the population

projected to live in cities by 2050, low literacy rates, a largely unskilled labour force, and unplanned urban sprawl are placing enormous pressure on housing, transport, water, and sanitation.²¹ Migration, both internal and regional, has created pockets of inequality and further burdened under-resourced urban municipalities.

The country's economy is noted for low-productivity agriculture,²² along with slow industrialisation and stagnant labour productivity, resulting in youth unemployment and underemployment. Widespread unemployment and underemployment mean that, like other countries in the region, Pakistan has suffered from brain drain.

While the country's balance of payments has benefited from remittances, Pakistani society appears to be losing its best talent to brain drain. According to the Pakistan Institute of Development Economics (PIDE), the country ranks sixth globally in human capital migration.²³ A 2025 Gallup survey also found that 66 percent of Pakistanis believe that individuals who move abroad are more intelligent than those who remain in the country.²⁴

Pakistan's Gini coefficient—a measure used to indicate income inequality—is the worst in South Asia.²⁵ According to the United Nations Development Program's annual reports, the top 1 percent of earners in Pakistan own 9 percent of the national income, while the bottom 20 percent account for just 7 percent.²⁶

Even more telling is that over 37 percent of public expenditure benefits the wealthiest, while less than 15 percent reaches the poorest. This is reflected in the taxation system, which focuses on indirect taxes that disproportionately target the middle and lower classes. A significant portion of the revenue of the state comes from indirect taxes such as GST and excise duties, the burden of which is overwhelmingly shouldered by the middle and lower classes because they allocate a greater share of their income for buying basic necessities like food and fuel. According to some estimates, a person who is exempt from income taxes may still end up paying over 40 percent of their income in indirect taxes.²⁷ This elite capture exacerbates the pre-existing economic, social, and ethno-religious crises, in turn worsening internal instability.

Pakistani Nationalism and Identity

Economic and demographic challenges only serve to deepen the fissures in Pakistani society and polity, the foremost being the issue of identity and nationalism. Since 1947, Pakistanis have debated whether theirs is a “Muslim-majority” nation or an “Islamic” one. This fault line plays out in politics, society, educational curriculum, economy, and foreign policy.

The entity called ‘Pakistan’ did not come into existence until the Partition of 1947, with the exit of the British Raj. Pakistan's nationalities and ethnicities predate the creation of the country, but the state has sought to impose an overarching Islamic ‘Pakistani’ identity,²⁸ denying the history and cultural identities of the regions that constitute it. For Pashtuns, the Baloch, and the

Sindhis, this represents an attempt by the more numerous Punjabis, who dominate the military and bureaucracy, to subjugate them.

The state's biggest fear remains a repeat of 1971 when East Pakistan broke away to become Bangladesh. Baloch and Pashtun irredentism, as well as Muhajir and Sindhi nationalism,^a are seen as a threat to Pakistan's security and integrity. The state has emphasised Islam as a national unifier, resulting in state support for Islamist organisations and militant outfits to fulfil regional foreign policy goals as well as domestic political purposes.

Pakistanis have suffered at the hands of terrorists nurtured to target Afghanistan and India, as domestic-terrorism-related fatalities have been increasing in recent years. According to the South Asia Terrorism Portal, there were 284 terrorism-related incidents in Pakistan in 2019, but that number has increased every year since and was pegged at 1,720 in 2025.²⁹ The Afghan Taliban's return to power in Kabul has led to a rise in attacks by its ideological counterpart, the Tehreek-e-Taliban Pakistan (TTP). There has also been a steady rise in attacks by Baloch insurgent and militant groups.

The state's response to these threats has varied, oscillating between seeking to negotiate and kinetic strikes against the TTP. Further, the

Pakistani state has always preferred to use the iron fist when dealing with Baloch insurgents and Pashtun and Sindhi nationalists. This includes enforced disappearances, unlawful arrests, and violent crackdown against peaceful protestors.

In 1947, Pakistan's founding father, Muhammad Ali Jinnah, may have promised the country's minorities that they would be treated as equals; that remains unfulfilled. Smaller Muslim sects—Ahmadis and Shias—and non-Muslims—Christians, Hindus, and Sikhs—face persecution, targeted violence, extrajudicial killings, and mob lynching. The country's blasphemy laws are among the most stringent in the world, resulting in several high-profile assassinations, including those of politicians and judges.³⁰

Looking Ahead

The Pakistani state has long had ambitions of attracting investments and becoming a trade and transit route, and, in turn, a key regional actor. The current global geoeconomic and geopolitical environment has led Pakistani leaders, both civilian and military, to believe that this time around the country may be able to leverage its location and global attention for economic gains. However, such a transformation would not be possible without building the country's human capital.

a Pakistan has long faced irredentist demands as well as insurgencies. Calls for Pashtunistan date back to the 1950s and have often been supported by Afghan leaders over the years. There has been an insurgency since the 1970s in Balochistan with demands for an independent Balochistan. The Pakistani state has long believed that India and Afghanistan seek to strategically encircle Pakistan, break it up and absorb its territory within their states. Since the 1960s there has been a strong Sindhi nationalist movement that has called for an independent Sindh. And finally, Muhajirs have long sought greater devolution within the province of Sindh and, if possible, a separate province.

Pakistan's smaller South Asian neighbours, Bangladesh and Sri Lanka, rank higher on human development and gender indices. The country has ignored the interests of its people in favour of military competition with India. Militarisation has prevented the state from building human capital, growing the economy, and stabilising the polity. If Pakistan's leaders seek to benefit from the current global environment, they will need to invest in human capital, especially women, implement structural economic reforms such as in taxation, and boost manufacturing and services to provide employment.

The country faces multiple internal conflicts between civil and military, religious and secular elites, ethno-linguistic sub-nationalities versus an imposed Islamist identity, and between rich and poor, and rural and urban. Its society is polarised and characterised by a multi-dimensional tussle for power and division of limited resources among its

ever-increasing population. To create a society that is conducive for human development, Pakistan's leaders would benefit from a territorial national identity instead of a religiously oriented one, as the former would help assimilate all minorities, religious as well as ethnic.

As a nation of 260 million and currently the second most populous Muslim-majority country, in a critical geostrategic location, Pakistan has always had potential. Unfortunately, Pakistan's dominant military-intelligence establishment along with some within the technocratic and political leadership have chosen to focus the country's resources on an eternal competition with India instead of on building the country's economic and human potential. Pakistan's way forward lies in sustained investment in its people and better relations with its South Asian neighbours, instead of being involved in regional great games or proxy wars.

The Inherent Fragility of Pakistan's Hybrid Political System

Sushant Sareen

The hybrid civil-military political structure currently ruling Pakistan may give the appearance of being firmly ensconced but it is inherently unstable. The power wielders and their supporters claim that the arrangement will remain in power for a decade or even longer.¹ Such confidence has been seen before,² only for those regimes to collapse much earlier than imagined. The current power structure is no different.

Pakistan's political structure stands on a single pillar that is the Pakistani Army. All other pillars of state³—the judiciary, legislature, executive—have either been emasculated or become redundant, or else have acquiesced to the power grab by the military. The perception of stability having returned to the political system is a chimera. Enforced stability has neither the institutional legitimacy nor the popular support that lends organic stability. The excesses that are an integral

part of such a regime to sustain itself in power, inevitably become the cause of its end, and all it takes is one event or one miscalculation.⁴

Even as it claims to be on a strong footing, the ruling dispensation in Pakistan is not unaware of its fragility. To ensure its survival, it is using all possible means to eliminate any challenge to the tightly controlled nominal democracy it has imposed on the country.⁵ The media has been strangled;⁶ the judiciary subjugated with the passage of the 26th and 27th⁷ Constitutional Amendment Acts; the political opposition has been all but dismantled⁸ by instituting politically motivated cases against political activists, manipulating the legal process to deny opposition parties any political space, and imprisoning top leaders of the principal opposition parties.⁹ The executive branch of government has subordinated itself to the military; and the legislature has been reduced to a rubber stamp to pass laws that sanctify the power grab of the military strongman.¹⁰

The result of this state and institutional capture is that despite maintaining the facade of democracy, traditional politics has become a caricature. The mainstream political parties that are part of the ruling clique are in power not because they enjoy popular support, but because they were installed in office by the military. Not surprisingly, these political parties are all competing for the affection of the military¹¹ and the now de jure generalissimo, Field Marshal Asim Munir. With traditional politics going into a shell, mainstream political parties such as the Pakistan Muslim League Nawaz (PML-N), the Pakistan People's Party (PPP), and the Muttahida Quami Movement (MQM), are unable to offer any new idea, ideology, or solution that can connect them with the people.

The loss of relevance of this kind of politics and these political parties has increasingly led to a political vacuum. Most of the established parties are now regional or sub-regional parties; there is no real national party left.¹² Perhaps Imran Khan's Pakistan Tehrik-e-Insaf (PTI) still has a pan-Pakistan following, but it is being systematically dismantled by the military establishment and its political rivals like the PML-N and the PPP, which have made common cause with the Pakistan Army against Khan. The ruling PML-N is a Punjabi party with some additional support in the Hazara belt of Khyber Pakhtunkhwa (K-P) province. The PPP is essentially a party of rural Sindh. MQM remains an urban Sindh party. The Awami National Party (ANP) exists only in K-P and the Pashtun belt of Balochistan, but even here, its core support has dwindled. Indeed, the core support of all the established—or 'establishment' parties—has shrunk. Most of their seats in the national

and provincial assemblies are courtesy the brazen rigging in the 2024 general elections.¹³

Part of the political vacuum created by the damage traditional political forces have inflicted on themselves is now being filled by what can be called peoples' movements such as the Pashtun Tahaffuz Movement (PTM) in K-P, the Baloch Yakjheti Committee (BYC) in Balochistan, the Joint Awami Action Committee (JAAC) in Pakistan occupied Jammu and Kashmir (PoJK),¹⁴ and to an extent, even the extremist, radical Barelvi party, Tehrik-e-Labbaik Party (TLP) in Punjab.¹⁵ At least in Balochistan and PoJK, the BYC and JAAC enjoy such overwhelming support that they have rendered the established political parties irrelevant. The PTM too, has captured the imagination of a large section of Pashtun youth. The TLP, meanwhile, has emerged as by far the largest religious political party, representing the underclass adhering to the Barelvi sect of Sunni Islam. But the state has come down hard on these movements: the PTM has been outlawed,¹⁶ and the BYC has been labelled a "proxy of a terrorist organisation"¹⁷ and subjected to a brutal crackdown, with its top leaders either in prison or 'disappeared'. The PTM and BYC, in fact, have never resorted to violence. The TLP has a violent track record, as displayed during its last march to Islamabad in October 2025.

Only the JAAC has so far successfully resisted efforts of the Pakistani establishment to bottle it up using force. This is partly due to the establishment's fear that any wrong move in PoJK could easily boomerang on Pakistan with devastating consequences for its stand on the Jammu and Kashmir issue. As a result, Pakistani

authorities have negotiated with the JAAC and, at least on paper, given in to most of its demands.¹⁸ The mighty Pakistani Army has also had to retreat from its ambitious “Green Pakistan” project after massive protests broke out in Sindh against the proposed canals that would have diverted Sindh’s share of water to green the Cholistan desert in Punjab.¹⁹ The success of the anti-canal movement in Sindh,²⁰ and of the JAAC in PoJK, has demonstrated the limits of the military-dominated hybrid regime’s power. The establishment parties too, have been caught in a bind. In Sindh, for example, the PPP tried to play both sides until it was forced by exigencies of political survival to desert the Pakistan Army on the canals issue.²¹

There is speculation that the hybrid regime is considering new constitutional amendments that will not only change the political geography of Pakistan by splitting the four provinces—Punjab, Sindh, Balochistan, and K-P—into multiple new ones, but also reserve a larger share of the country’s revenue for the federal government to consolidate and concentrate power in Islamabad. However, a repeat of the kind of protests that brought Sindh to a standstill on the issue of the new canals could block this. The heavy-handed crackdown on peaceful protest movements²² has had the unintended consequence of granting some legitimacy to the armed insurgencies in Balochistan and K-P.²³ The armed Baloch freedom fighters often argue that political negotiation with the Pakistani state is pointless. The Tehrik-e-Taliban Pakistan (TTP), the Taliban’s branch in Pakistan, while not rejecting talks with the Pakistani state, is unwilling to retreat from its maximalist demands.

In large parts of K-P and Balochistan, the insurgents have become so strong that the writ of the state no longer runs.²⁴ Established politicians in Balochistan, including former chief ministers, have openly said that the only person who presently counts in the province is the incarcerated leader of BYC, Mahrang Baloch. Meanwhile, there are incipient movements in Sindh and even Punjab to challenge the Pakistani state. After the violent clashes between the authorities and the TLP in Punjab, there have been reports of some TLP cadres forming an armed resistance wing.²⁵ In Sindh, there are violent groups like the Sindhudesh Revolutionary Army (SRA) engaged in low-level operations. The SRA, however, has still not gained the kind of traction needed, like that of the BLA and the TTP, to pose a threat to the state.

The emergence of peoples’ movements and armed insurgencies are only part of the problem confronting the hybrid political system. Its failure on the economic front and at governance are only adding to the disquiet. No doubt, the regime has tried to rehabilitate its image by claiming victory in the short clash with India during Operation Sindoor in May 2025. But that has not created jobs, brought in investments, or kickstarted the economy.²⁶ Flaunting foreign policy gains²⁷—the rekindling of the relationship with the United States, the defence agreement with Saudi Arabia, Pakistan’s involvement in the Gaza negotiations, its growing closeness with Bangladesh—might make the headlines but have not yielded any economic benefits. If anything, the deteriorating security situation along both the western front with Afghanistan and the tense stand-off on the eastern front with India have impacted the economy adversely and injected more uncertainty about the future.²⁸

While the economy is stable, this stability is tenuous. Economic growth barely keeps pace with population growth. Unemployment is at around 22 percent,²⁹ with youth unemployment at an estimated 34 percent. Investment is at a historic low.³⁰ The severe floods of June 2025 hit the heartland of Punjab hard, causing enormous losses.³¹ The regime has managed to quell growing economic pressures so far in part by resorting to hyperbole—claims are made of hundreds of billion dollars' worth of fresh gold reserves having been found;³² trillions worth of minerals;³³ and having the world's fourth largest oil reserves.³⁴

The regime's hubris has prevented it from reaching out to political opponents and thereby easing the pressure building up in the system. It feels no need to try and mend relations with the main opposition party, PTI. The military appears to have concluded that Imran Khan and PTI need not have any role in Pakistan's politics. Even the establishment parties are content with keeping PTI out because its return could sound the death knell of their power and politics. Using brute power to solve every crisis, including economic ones, appears to be the favoured solution of the regime. But power has its limitations, and when that line is crossed, the current system could come crashing down.

Default, Dollars, and Dilemmas: Assessing Pakistan's Economic Gamble

Soumya Bhowmick

This article analyses Pakistan's manifold economic predicament in 2025, tracing its repeated International Monetary Fund (IMF) bailouts, structural weaknesses, and geopolitical entanglements. It examines recent stabilisation gains under the latest IMF programme while highlighting persistent vulnerabilities in taxation, energy, and governance. The essay argues that without deep domestic reforms, Pakistan risks remaining in a vicious cycle of crises and external rescues.

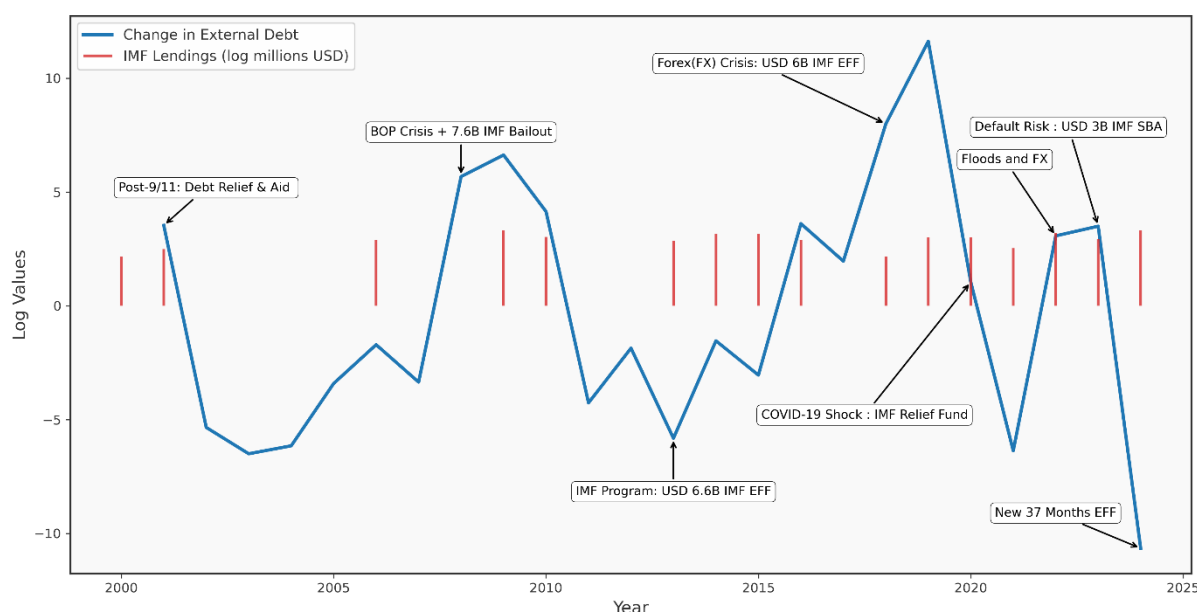
The Layers of Pakistan's Structural Fragility

Pakistan's economic history has been marked by recurrent crises and heavy reliance on IMF assistance for nearly seven decades. As of mid-2025, the country is under its 24th IMF programme since 1958, reflecting deep-seated policy inertia and structural fragilities. Although a US\$7-billion IMF Extended Fund Facility (EFF)

approved in September 2024¹ helped avert default and offered a temporary rebound in reserves, a stabilised rupee, and relief from runaway inflation, fundamental vulnerabilities remain. Pakistan continues to grapple with a narrow tax base, persistent energy-sector deficits, weak export competitiveness, and governance weaknesses, all of which hinder sustainable growth.

The country's external debt has ballooned from US\$10 billion in the 1980s² to over US\$130 billion by 2024,³ compounded by geopolitical tensions, costly military engagements, and climate disasters such as the devastating 2022 floods, which caused losses worth US\$30 billion (see Figure 1).⁴ Notably, China remains Pakistan's largest bilateral creditor and China-Pakistan Economic Corridor (CPEC) partner, with Chinese lending accounting for about 22 percent of Pakistan's total external liabilities, adding to Pakistan's debt-servicing challenges alongside its continued reliance on Western and multilateral lenders for budget support.⁵

Figure 1: Pakistan’s External Debt and IMF Lending



Source: FRED (St. Louis Fed)⁶ & IMF⁷ (Created by Manish Vaidya at ORF using Matplotlib)

At the structural level, Pakistan faces deep-rooted deficiencies. According to Federal Board of Revenue data, total income tax returns for Tax Year 2023 stood at 6.4 million; set against Pakistan’s 2023 census population of 241.49 million, this is equivalent to only about 2.7 percent of the population, although this comparison is indicative rather than a measure of taxable adults because the denominator includes children, non-earners, and others outside the income-tax net. The low filing base nevertheless underscores

weak documentation, pervasive informality, and the narrowness of Pakistan’s effective tax base.⁸ Powerful interest groups in sectors such as real estate, retail, and agriculture oppose tax reforms, leading to an overreliance on indirect taxes that inflate consumer prices and strain low-income households. Although direct taxes have grown from 36.5 percent of federal revenue in FY2022⁹ to 48.7 percent in FY2025,¹⁰ the tax-to-GDP ratio hovers near 10 percent,¹¹ far short of the 15-percent threshold for fiscal stability.

Meanwhile, Pakistan's economy remains undiversified and import-dependent, with heavy reliance on textiles and energy imports, leaving it vulnerable to oil price shocks—a key factor in 15 of its 23 IMF interventions,¹² which were pursued during global oil price surges. Chronic energy crises have led to a ballooning circular debt, which reached approximately PKR 5.7 trillion (~US\$20 billion) by early 2024. This increase has been driven by subsidised tariffs, transmission losses, and mounting arrears.¹³ Governance failures exacerbate these problems, as entrenched patronage networks and military influence derail long-term economic planning. This has stalled critical reforms, including the privatisation of loss-making state-owned enterprises and efforts to widen the tax net, thereby perpetuating a cycle of crisis and bailouts.

The IMF's Double-Edged Rescue

Pakistan's latest IMF programme, initiated in 2024, demonstrates both the short-term relief and the harsh socio-economic costs typical of its bailout cycles. The US\$7-billion EFF agreement,¹⁴ with an upfront disbursement of US\$1 billion, stabilised the economy, doubling foreign reserves from US\$4.5 billion in June 2023 to US\$8.2 billion by December.¹⁵ Painful reforms—including sharp rupee depreciation, the lifting of import restrictions, high interest rates of 22 percent,¹⁶ and increased energy tariffs and fuel taxes—were politically contentious but necessary to ease external imbalances.

By early 2025, the IMF deemed Pakistan's performance “strong so far,” as macroeconomic indicators showed signs of recovery.¹⁷ Gross

Domestic Product (GDP) growth rebounded to around 2.7 percent in FY2025.¹⁸ Inflation, which peaked at 38 percent in May 2023,¹⁹ eased sharply by early 2025, prompting the State Bank of Pakistan to slash interest rates from 22 percent to 12 percent.²⁰ This significantly reduced borrowing costs and raised hopes of an investment revival.

Financial markets responded exuberantly to macro-stabilisation under IMF oversight, with the KSE-100 index surging by roughly 85 percent in 2024,²¹ placing Pakistan among the top-performing stock markets globally. This rally was primarily driven by domestic institutional investors in sectors like banking and energy, buoyed by falling interest rates and improved currency stability. However, structural weaknesses persisted beneath the surface. Foreign direct investment remained subdued due to ongoing political and security risks. At the same time, export growth was modest, rising only 6.8 percent year-on-year during July–April FY2025,²² overshadowed by a nearly 12-percent increase in imports as domestic demand picked up.²³

Although Pakistan achieved a rare current account surplus of US\$1.9 billion during this period, this was primarily driven by compressed imports and record remittances rather than exports.²⁴ Meanwhile, fiscal tightening under IMF conditions imposed deep social strain. The World Bank's 2026 Macro Poverty Outlook estimates that poverty at the lower-middle-income poverty line rose from 44.7 percent to 47.9 percent over FY2019–25, showing that macroeconomic stabilisation has not yet translated into broad-based welfare gains.²⁵

Corruption, Conflict, and the IMF's Blind Spot

A significant dimension of Pakistan's 2024–2025 IMF programme is its heightened focus on governance and anti-corruption reforms, recognising institutional weaknesses as a core economic impediment. In February 2025, Pakistan's finance ministry said that a three-member IMF mission would visit the country to conduct a Governance and Corruption Diagnostic Assessment (GCDA) under the 2024 Extended Fund Facility. The assessment was designed to examine corruption vulnerabilities across core state functions, including fiscal governance, central bank governance and operations, financial-sector oversight, market regulation, the rule of law, and anti-money laundering and counter-terrorism financing systems.²⁶

The diagnostic, later published by the IMF in November 2025, identified persistent and widespread corruption risks in Pakistan's state-dominated economy, marked by weak institutional capacity, fragmented oversight, inconsistent accountability, and constrained rule of law. It also pointed to reform steps that had begun to emerge, including amendments requiring senior civil servants to file asset declarations with the Federal Board of Revenue digitally and to make them publicly accessible, while also stressing the need to strengthen anti-corruption institutions such as the National Accountability Bureau and to address concerns about selective accountability.²⁷

Amidst escalated tensions after the deadly terror attack in Pahalgam in April 2025, the IMF completed the first review of Pakistan's

US\$7-billion Extended Fund Facility, allowing an immediate disbursement of about US\$1 billion, and separately approved a US\$1.4-billion Resilience and Sustainability Facility, though this did not immediately translate into fresh disbursement. The timing drew concern in India that external financing could indirectly ease fiscal pressure on Pakistan at a moment of heightened military tensions.²⁸ The Fund's engagement, however, remains technocratic, often sidestepping the fact that Pakistan's geopolitical choices fuel economic distress.

Despite progress on paper, Pakistan's entrenched power structures continue to obstruct meaningful reform. By July 2025, the publication of the IMF's Governance and Corruption Diagnostic report had become a programme-compliance issue, as Pakistan was expected to publish the full report by the end of July but failed to meet the deadline. The delay underscored the political sensitivity of governance reforms, even as energy-sector reforms continued to face resistance from entrenched vested interests.²⁹ The government's June 2025 syndicated loan of PKR 1.275 trillion (~US\$4.5 billion)³⁰ was aimed at clearing power-sector arrears without ballooning the fiscal deficit; yet core issues—such as theft, inefficient pricing, and politically connected defaulters—remain largely unaddressed.

Moreover, Pakistan's civil-military imbalance complicates the prospects for reform. The military's influence over major projects, notably under CPEC, often sits uneasily with the IMF's emphasis on transparency, competitive procurement, and tighter fiscal control. This tension became sharper in FY2025–26, when

Pakistan raised defence spending by 20 percent to PKR 2.55 trillion, even as overall federal spending was cut by 7 percent.³¹ This underscores how security priorities continue to compete with fiscal consolidation and development spending under IMF-backed adjustment, and why sustainable economic progress in Pakistan requires not just technical fixes but deeper political recalibration.

Pakistan's Precarious Future

Beyond the IMF, Pakistan's economic survival continues to depend on a wider network of international partners. In January 2025, the World Bank launched a new 10-year Country Partnership Framework focused on human capital, private-sector growth, climate and environmental resilience, cleaner energy, fiscal space, and productive private investment. These priorities are broadly aligned with the IMF's stabilisation agenda. Yet multilateral support also increases scrutiny of transparency, procurement standards, and contingent liabilities, particularly in sectors such as energy, where fiscal leakages, circular debt, and opaque contracting have long constrained reform.³²

By 2026, however, Pakistan's position had shifted from immediate default avoidance to managed fragility. In May 2026, the IMF completed the third review of Pakistan's Extended Fund Facility and the second review of its Resilience and Sustainability Facility, allowing access to about US\$1.1 billion under the EFF and about US\$220 million under the RSF. This brought total disbursements under the two arrangements to around US\$4.8 billion.

The IMF noted that gross reserves had risen to US\$16 billion by end-December 2025, up from US\$14.5 billion at end-June 2025, but also warned that external uncertainty, energy-price volatility, and unfinished reforms continued to weigh on the outlook.³³

The World Bank's 2026 assessment offers a similarly cautious picture. Real GDP growth is projected at around 3 percent in FY2026 and 3.2 percent in FY2027, suggesting a recovery but not a transformation. More importantly, poverty remains a binding concern: the lower-middle-income poverty rate rose from 44.7 percent to 47.9 percent over FY2019–25, showing that macroeconomic stabilisation has not yet translated into broad-based welfare gains. This is the central dilemma of Pakistan's adjustment cycle: stabilisation can rebuild reserves and calm markets, but it cannot by itself repair livelihoods, restore investor confidence, or create a more productive economy.³⁴

Regional allies such as China, Saudi Arabia, the United Arab Emirates (UAE), and Qatar will likely continue acting as financial first responders whenever Pakistan's reserves come under pressure. Beijing's loan rollovers, Gulf deposits, and deferred oil facilities may prevent disorderly default, but they cannot substitute for domestic reform. These bilateral lifelines buy liquidity, not solvency. Pakistan's repeated reliance on external rollovers also leaves every reserve buildup vulnerable to commodity-price shocks, exchange-rate pressures, and delays in fiscal, energy, and governance reforms.

Pakistan, therefore, stands at a difficult juncture. The country has gained time, but not yet a durable exit from crisis management. The policy challenge is no longer only about securing the next IMF tranche or bilateral rollover. It is about using the breathing space created by external financing to widen the tax base, reduce

energy-sector losses, improve public procurement, discipline state-owned enterprises, and build export competitiveness. Without these domestic fixes, the current recovery risks becoming another pause between crises. With them, Pakistan could begin the harder transition from bailout dependence to genuine economic resilience.

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Decoding Pakistan's Media Landscape

Soumya Awasthi

The media is considered the “fourth pillar” of a democracy, rooted in the idea that a free and independent press is essential to holding power accountable, informing citizens, and sustaining democratic institutions.

In Pakistan, the role of the fourth pillar is highly contested and constrained, often subject to the rules of military regimes. Although the national media landscape comprises several government and private media houses, structural, religious, and military pressures limit the freedom of press. The media is dynamic in form but deeply controlled in function.

Historical Context: From State Organ to Commercial Expansion

Pakistan's media has evolved alongside the country's turbulent political trajectory, from its inception in 1947 to the present day. Initially dominated by state-controlled print outlets, such as *Dawn* and *Nawa-i-Waqt*, which championed the

Pakistan Movement^a and operated under tight government oversight. Radio Pakistan and *Dawn* were tasked with the twin objectives of fostering national unity and reinforcing the fledgling state's Islamic identity.¹

In the 1960s, the establishment of the Pakistan Television Corporation (PTV) marked a milestone, as it brought the country its first television broadcasts.² However, PTV was never intended to be an independent public broadcaster and functioned as a state organ.³ During periods of military rule, most notably under Ayub Khan and Zia-ul-Haq, the media's primary objective was to legitimise the regime, suppress dissent, and promote ideological cohesion. Zia's Islamisation drive in the 1980s, for instance, was accompanied by strict censorship and the infusion of religious programming into news and entertainment content. The state's strategic use of media as a political instrument, whether for domestic legitimacy or foreign policy messaging, remains a constant.⁴

^a The Pakistan Movement was a 20th-century political and social campaign that successfully advocated for the creation of Pakistan as an independent, sovereign state for the Muslims of British India.

The Media Landscape

According to a 2025 Gallup report,⁵ Pakistan's media environment has become diverse with the coming of new-age media, yet tightly constrained, shaped by technology, regulation, and shifting audience preferences. Internet penetration has reached nearly half the population, with 116 million users and some 67 million social media accounts, fuelled by cheap smartphones and widespread 4G coverage. YouTube dominates with daily drama shows attracting over a billion views.⁶ Despite being officially banned in 2024, X continues to thrive through VPN (Virtual Private Network) use,⁷ while TikTok and Instagram drive short-form content and influencer-led debates. Television, with over 100 private channels, remains highly influential, although political talk shows have lost ground to dramas and reality formats.⁸

Channels such as Geo, Hum, and Green TV command the largest audiences, while regulatory pressure from PEMRA (Pakistan Electronic Media Regulatory Authority) compels broadcasters to tread carefully, favouring entertainment over critiques of state institutions. Print media, once a cornerstone of Pakistan's information landscape, has shrunk from thousands of publications in the early 2000s to a fraction of that today, with stalwarts such as *Dawn* and *Jang* struggling to sustain revenue in digital form. English-language dailies like *The News* and *Express Tribune* continue to shape elite opinion; however, their reach is marginal when compared with Urdu and regional outlets.⁹

Who Controls the Media?

The media sector is formally regulated through laws such as the PEMRA Ordinance 2002,¹⁰ which can give or revoke a license to the private electronic media. The Press Council Ordinance ensures the ethical standards of print journalism; and provisions in the 1973 Constitution that guarantee freedom of speech and of the press but also permit restrictions in the name of national security and integrity of the state are overseen by the Ministry of Information and Broadcasting. Yet absolute control lies beyond these frameworks. PEMRA, rather than fostering independence, operates under the influence of the military's Inter-Services Public Relations (ISPR).

The Zia regime (1977–88) marked one of the darkest chapters in Pakistan's media history. Newspapers and magazines were shut down, journalists imprisoned, and sweeping censorship imposed on cinema, television, and print. The state-run PTV became a tool of social engineering, imposing rigid moral codes such as mandatory head coverings for women newscasters.

While Article 19 of the Constitution guarantees freedom of expression, the right is heavily qualified. It is subject to restrictions in the name of Islam, state security, foreign relations, public order, or morality.¹¹ In practice, this means that citizens cannot criticise the state, its institutions, or religion without risk of censure or punishment. Beyond state control, blasphemy laws are frequently weaponised by rivals and hardliners against journalists.¹² Journalists such

as Hamid Mir and Shahzeb Jillani have faced bans on their reporting, and other journalists from the Ahmadiyya community have been arrested for blasphemy charges,¹³ often following critical reporting.¹⁴ Coverage of protests, such as those following Imran Khan's arrest in 2023, was abruptly curtailed, with bulletins replaced by entertainment.¹⁵

Thus, media control in Pakistan operates through a spectrum of mechanisms: direct censorship and broadcast bans, covert intimidation, and harassment, all of which combine to keep journalism within carefully enforced limits.

Digital Media and Narrative Control

The year 2025 saw the reshaping of Pakistan's media through rapid digital expansion.¹⁶ Mobile phones are now near-universal, with 91 percent of households reporting ownership and 55 percent of adults possessing a personal device. However, stark gender disparities remain: 85 percent of men own a phone, compared to just 24 percent of women, although many women report shared access within their households.¹⁷ Around 14 percent use phones to listen to the radio, 12 percent to access the internet, and just under 10 percent to visit social networking sites.¹⁸

Platforms such as YouTube, TikTok, Facebook, and Instagram dominate online activity. Social media functions as an alternative news space, particularly for younger, urban audiences, where citizen journalists livestream protests and mobilise opinion. These platforms are also prone to manipulation, with political actors and state agencies orchestrating disinformation campaigns.

Usage patterns reveal sharp divides: men account for 63 percent of users, with the largest segment being those between 18 and 34 years of age. TikTok draws younger, lower-income users in small towns, while Facebook and Instagram dominate urban spaces.

Importantly, both digital and traditional media are used to reinforce state narratives. Coverage of the Pulwama-Balakot crisis (2019), the Taliban's return to power (2021), and the Pahalgam attack (2025), as well as Operation Sindoor (2025), illustrated how television, newspapers, and the ISPR's online presence worked in tandem to project images of restraint or stability, often masking domestic challenges.¹⁹

Challenges to Media Freedom in Pakistan

Press freedom in Pakistan has continued to erode, with the country ranking 158th out of 180 on the Reporters Without Borders World Press Freedom Index 2025.²⁰ This reflects the state's tightening grip on information flows and a further decline in media independence. Regulatory initiatives such as the proposed Pakistan Media Development Authority (PMDA) have been widely criticised as attempts to centralise oversight of both digital and traditional platforms, effectively extending state control into all corners of the media sphere.²¹

At the same time, laws such as the Prevention of Electronic Crimes Act (PECA) and expansive defamation provisions have become instruments for silencing dissent, with journalists and commentators becoming increasingly wary of legal punishments.²² The personal safety of these

individuals remains another pressing concern. The Committee to Protect Journalists records that 105 media workers were killed between 2000 and 2016.²³ Although fatalities have declined in recent years, harassment, intimidation, and imprisonment persist, with online accounts in 2025 highlighting an environment of shrinking space for free expression.²⁴

The digital domain, often seen as the last refuge for independent voices, has also been constrained. In 2024, firewall experiments greatly slowed internet speeds, disrupting social media access and prompting backlash from citizens and businesses that relied on connectivity. The ban on X in 2025 epitomises this struggle, as the government sought to stifle anti-state narratives while users relied on VPNs to evade restrictions.²⁵ Taken together, these developments reveal a landscape where regulatory expansion, legal coercion, physical intimidation, and technological controls converge to narrow the limits of free speech. What appears on the surface as a diverse and dynamic media environment is, in practice, carefully managed. The price of crossing red lines, whether through investigative reporting, criticism of the military, or digital activism, remains prohibitive.

Conclusion

Pakistan's media ecosystem today is a complex amalgam of old and new, where traditional broadcast outlets operate under tight state control and social media offers both a platform for dissent and a new arena for narrative management. The military's influence over editorial agendas, combined with the growing power of digital platforms, has created a hybrid model of communication where a mix of coercion, commercial imperatives, and technological innovation shapes information flows.

In the context of relations with India and Afghanistan, media strategy functions as an extension of foreign policy, aimed at bolstering domestic morale and influencing international perceptions. Yet this same apparatus often marginalises critical debate on pressing social issues, from blasphemy laws to socio-economic reform. Without systemic reforms that guarantee editorial independence and promote journalistic standards, the Pakistani media risks remaining a vehicle for state propaganda rather than a true 'fourth pillar' of democracy.

The Baloch Insurgency: Tactics, Expansion, and Regional Fallout

Shakoor Ahmad

Pakistan's southwestern province of Balochistan has been in the throes of low-intensity insurgency since the turn of this century. Driven by deep-rooted grievances over resource exploitation, political marginalisation, and militarisation, the Baloch have mounted a prolonged armed resistance that has ebbed and flowed over two decades. For all its longevity, the Baloch ethno-nationalist movement has never seriously challenged Pakistan's security forces or threatened the country's territorial integrity. Poor training, minimal external support and, above all, the internal schisms and absence of a unified leadership had hitherto hindered the ability of militants to mount a coordinated response. These weaknesses allowed Pakistan to exploit divisions, undermine the movement, and suppress it by military means.

Over the years, however, the movement has undergone spatial, organisational, and regional transformation, making it a more cohesive and potent force. As a result, the earlier tactics of isolated guerrilla raids in rural terrain have given way to high-profile hijackings, urban suicide bombings, and precision strikes. This has increased the visibility of the simmering conflict in the province, a long-sought goal of Baloch nationalists and has raised the stakes for Pakistan, which is struggling to secure Chinese investments and personnel in the region.

This article traces the insurgency's evolution in recent years, examines how new tactics reflect deeper strategic shifts, and analyses the implications for Pakistan and the broader region. It argues that, as the Baloch militant groups continue to evolve into a more cohesive, ideologically driven movement and employ sophisticated urban and infrastructure-focused

attacks, Pakistan's traditional military-centric counterinsurgency responses are found wanting. The result is a conflict that threatens Pakistan's national security, jeopardises mega-projects like the China–Pakistan Economic Corridor (CPEC), and destabilises regional dynamics, straining its relations with China and exacerbating its already tense engagements with Iran and Afghanistan.

Shifting Tactics and Nature of Attacks

The current insurgency is no longer what it used to be in the early 2000s. Initially a localised rebellion that began in the Dera Bugti and Kohlu districts, it has since spread across vast swathes of the province—including non-tribal areas like the southern Makran belt and urban centres like Quetta. This geographical expansion parallels the transformation of insurgent outfits. Previously comprising largely mono-tribal formations, these groups have increasingly diversified their recruitment base. Young men and women, including educated graduates from middle-class families with no prior militant connections, have joined the ranks of insurgent groups such as the Baloch Liberation Army (BLA).¹

Balochistan, endowed with abundant natural resources and host to expanding Chinese investments under CPEC, has gained greater economic significance for Islamabad, which views the province as critical to reviving its faltering economy. The Baloch, long resentful of the exploitation of their natural wealth, have seen little benefit, as projects often follow a familiar pattern of exclusion, misappropriation, and skewed revenue distribution, leaving the local

population among the most deprived in the country.² This resentment has often erupted in violence, targeting energy infrastructure and Chinese personnel, who are seen as complicit in the resource exploitation.³

Islamabad has responded to local concerns by intensifying militarisation of the province, producing a landscape dominated by symbols and instruments of state violence: cantonments, check-posts, and detention facilities. This has radicalised a generation of young people, who are frustrated with the older ways of organising along parochial tribal lines that fragments resistance. Seeking to transcend tribal loyalties and forge alliances across class and tribal divides, this generation—more urban, educated, and ideologically driven—is more strident in articulating Baloch nationalism. They see little scope for a *modus vivendi* with a state unwilling to pursue negotiated settlements, instead relying on militaristic responses to grievances that could have otherwise been remedied within the country's constitutional framework.⁴

These structural shifts have allowed for greater organisational sophistication and tactical innovation. In 2018, a motley collection of insurgent outfits came together under the umbrella of the Baloch Raji Aajoi Sangar (BRAS), which includes the BLA, Baloch Liberation Front (BLF), Baloch Republican Guard, and the Baloch Republican Army. While they continue to operate autonomously, their coordination—both logistically and strategically—has increased, allowing for joint operations across the province.⁵

A striking feature of this transformation is the tactical shift from traditional guerrilla warfare in the hinterlands, to urban insurgency and high-impact symbolic violence. Insurgents frequently target economic infrastructure, especially if linked to CPEC, as well as soft civilian targets. Suicide bombings, once alien to Balochistan's secular armed resistance, mark a new development. Although such attacks are still rare—the first recorded instance was in 2011—their frequency has increased since 2018. The April 2022 attack by Shari Baloch, a highly educated schoolteacher, was the first female suicide bombing in the insurgency, underscoring deepening ideological commitment within its ranks. Separatist groups have also embraced *fedayeen* (self-sacrificing) attacks, designed to inflict maximum damage and sometimes involving the taking of hostages, with militants operating under the expectation of not surviving the assault.⁶

Recent years have witnessed escalation in the sophistication, coordination, and lethality of Baloch insurgent operations. High-profile offensives—such as the BLA's Operation Herof (Black Storm), Operation Dara-e-Bolan (named after a historic mountain pass) and Operation Zir Pahazag (Guarding the Coast), along with the BLF's Operation Baam (Dawn)—have combined complex planning, coordinated multi-pronged assaults, and the use of modern weaponry. These attacks have targeted security forces, critical infrastructure, and symbolic sites, demonstrating enhanced training, improved inter-group cooperation, and a strategic shift toward high-value, high-impact targets.⁷

These attacks, besides inflicting significant casualties, showcase the insurgent group's expanding operational capabilities. For example, recent high-profile attacks like those on the Gwadar Port Authority (GPA), which is a symbolic and strategic node of CPEC, or the attempted storming of the Chinese Consulate in Karachi, demonstrate not only the insurgent group's expanding reach but also its growing focus on Chinese targets. More recent was its hijacking of the Jaffar Express, a passenger train travelling from Quetta to Rawalpindi, which resulted in the kidnapping of more than 400 passengers.⁸

These incidents reveal the evolution of Baloch insurgency—from a fragmented armed resistance organised along tribal lines, to a modern asymmetric warfare marked by urban infiltration, precision targeting, and symbolic violence. Insurgents now routinely target high-value assets, Chinese personnel, and state infrastructure. A combination of improved training, greater inter-group cooperation, and access to modern weapons has increased the intensity and lethality of attacks. The high casualty toll and operational complexity of recent offensives underscore how Baloch insurgent groups have transformed into ideologically committed and militarily capable actors.

Implications for Pakistan and Regional Security

With the intensification of Baloch insurgency, Pakistan now confronts multifaceted internal security challenges. The Tehrik-e-Taliban Pakistan (TTP) has escalated its insurgency within Pakistan since the Afghan Taliban's return to power in

August 2021. In 2024, TTP attacks reached a record high, with fatalities at their highest since 2011.⁹ As though the Taliban's enabling hand in TTP's resurgence were not enough, Baloch insurgent groups like the BLA have also grown bolder since Kabul's fall. Their commander-in-chief, Bashir Zaib, is believed to operate openly from Afghanistan, using it as a base for training with the TTP, coordinating attacks, and tapping into United States (US)-made weapons like sniper rifles, sophisticated night-vision goggles, and other military equipment left behind during the withdrawal of US troops.¹⁰ Safe havens for anti-Pakistan groups in Afghanistan, along with the Taliban regime's patronage of groups like the TTP, have led to the fraying of ties between the two neighbours.¹¹

The uptick in violence has also resulted in the worsening of Islamabad's relationship with its other neighbour, Iran, due to cross-border militant sanctuaries. Militants from both sides of the divide have for years exploited the porous Pakistan–Iran border to launch attacks against the two countries. In January 2024, Tehran carried out missile strikes into Pakistan's Balochistan province against the strongholds of anti-Iran insurgent group Jaish al-Adl (Army of Justice), which Islamabad denounced as a violation of its sovereignty.¹² Barely two days later, Islamabad retaliated with Operation Marg Bar Sarmachar (Death to Insurgents), conducting air and missile strikes in Iran's Sistan and Balochistan province, targeting hideouts of Baloch separatist groups operating from Iranian soil. Tensions between the countries mounted, leading to the suspension of diplomatic ties until 2024, when both sides de-escalated through diplomatic channels.¹³ These

military skirmishes highlight the fragility of trust on both sides of the border, and how insurgent movements can destabilise regional stability.

With the insurgency in Balochistan evolving into a more lethal threat, Islamabad's resources and focus have been stretched thin. Seeking to reassert the state's writ and safeguard critical Chinese investments, Pakistan has fallen back on its familiar heavy-handed tactics, including large-scale cordon-and-search operations and communication blockades. Against the backdrop of surging insurgent violence and mounting pressure from Beijing to protect its personnel and installations, Islamabad launched a comprehensive nationwide counterterrorism initiative in 2024, Operation Azm-e-Istehkam (Resolve for Stability).¹⁴

For the Pakistani military, the roots of the conflict in Balochistan lie not in the province's socio-economic marginalisation or militarisation but in external factors. It blames a host of actors, including Afghanistan, but particularly India, for fomenting rebellion in the province. Such a characterisation obviates the need to address long-standing Baloch grievances, and instead justifies reliance solely on kinetic responses. The military's propensity for disproportionate force is likely to further alienate local communities, with direct implications for regional stability as more disgruntled Baloch join the insurgency.

With Islamabad uninterested in a negotiated settlement, the insurgency is likely to become more protracted and lethal. It is expected to shift increasingly toward urban centres, with high-visibility attacks targeting Chinese nationals and symbolic civilian infrastructure. Insurgent groups

are becoming better organised and equipped, turning into more sophisticated and disciplined forces. The involvement of urban, educated classes—including women capable of leveraging social media for recruitment and propaganda—has allowed them to enhance international visibility.

Unless Pakistan comes up with a comprehensive domestic and regional strategy that combines genuine political dialogue with moderate Baloch leadership, equitable development, accountability for human rights abuses, and engagement with neighbouring Afghanistan and Iran to build trust, secure borders, dismantle militant sanctuaries and coordinate operations—the security situation is likely to deteriorate in the region.

II

Military and Civil-Military Ties

Civil-Military Relations in Pakistan: Conflict, Continuity, and Change

Rana Banerji

Civil-military relations in Pakistan have historically been fraught with tension. Initially, in the 1950s, it was due to the Army's disdain of bickering politicians as they delayed the drafting of the Constitution, and thereafter, on account of the Army's contempt for the politicians' failure at governance. Whenever civilians came to power and sought to incrementally increase their political space, the military establishment has shown that it was not prepared to forego its dominant role in formulating and controlling vital aspects of the country's security, nuclear, and foreign policy.

This mindset was partly entrenched by the insecurities of Partition, wherein the Army's top leadership remained obsessed with, and bitter about, perceived inequities in the division of assets vis-à-vis the Indian Army. Officers and stores were shared by the two in a ratio of 36:64. Pakistan got six armoured regiments, eight artillery, and eight infantry regiments, compared to India's 12

armoured, 19 artillery, and 21 infantry regiments. Pakistan could inherit only two major military institutions—the Staff College, Quetta, and the Army Service Corps School near Abbottabad, which later became the Pakistan Military Academy, Kakul. In East Pakistan, now Bangladesh, the Army only got the Regimental Training Centre in Chittagong (now Chattogram).

Jinnah's early demise in September 1948, and the absence of a charismatic politician after Liaquat Ali's murder in October 1951, contributed to this insecurity, and led to Pakistan's nation-building process being overtaken by authoritarian trends.

Pakistan has gone through an almost cyclical process of political turbulence, in which the democratic endeavour has been repeatedly interrupted by nine- to 11-year-long stretches of direct rule by Army dictators: Generals Ayub Khan (October 1958-March 1969), Zia ul Haq (July 1977-August 1988) and Pervez Musharraf

(October 1999-August 2008).^a Each one of these interregnums was initially welcomed by civil society; business and feudal elites rushed to make their peace with the abrogation of political processes. In due course, however, all institutions except the Army got weakened, and eventually, ennuui against Army rule set in, voiced through attempts at judicial independence or mass protests.

During these upheavals, the Army cast and projected itself as sole defender of Pakistan's sovereignty, integrity, and indeed its very existence. It also did not hesitate to employ the Islamic crutch to curb dissent. Embracing Islamic ideological underpinnings—of *imam* (belief), *taqwa* (fear of Allah), and *jihad-fi-sabilillah* (fight in cause of Allah)—it pledged to adhere to a philosophy of “fighting to the end.”¹

The first ‘discrediting’ of the Army’s image came with the country’s breakup in 1971, with East Pakistan forming a separate country, Bangladesh. The Hamoodur Rehman Commission of Enquiry, set up in December 1971 to look into the political and military failures that led to the secession, submitted its first report in July 1972. However, the findings remained suppressed till they were leaked to the media in 2000.² The report accused the Pakistani Army of wanton arson in East Pakistan, of killing East Pakistani Army officers and soldiers, and of executing intellectuals and professionals at Dhaka and Chittagong Universities and burying them in mass graves. It also flagged army corruption among a large number of senior officers, particularly those in the highest positions.

This lust for preferential allotment of priceless urban property at cheap rates subsequently became a characteristic ethos of the Pakistani Army, which has formed several so-called defence housing societies to apportion land at cheap rates for different ranks. One Lahore Corps Commander, Lt Gen Zarar Azam, was even pejoratively nicknamed ‘Zameen Azam’ (supreme holder of land).

As years passed, the military’s role also became highly visible in the economic sector. Many lucrative private sector positions were made available to retired military personnel, as the so-called ‘Mil Bus’ (military business) spread roots.³

The November 1988 elections, after Zia ul Haq’s death in a plane crash, saw the first attempt in the country at a genuine move towards democracy. Benazir Bhutto’s Pakistan People’s Party (PPP) came to power with a slender majority, but she had to accept an Army nominee—retired General, Sahibzada Yaqub Khan—as her foreign minister. Thereafter, the interregnum of 1988-99 saw four elections. As the Army tired of Benazir Bhutto, Nawaz Sharif was propped up as the new favourite, first as chief minister of Punjab in December, 1989 and then as prime minister in August 1990.

Since then, civil-military relations in Pakistan have alternated between direct—and sometimes brutal—domination by the military, and reluctant power-sharing with civilian governments. In July 1993, there occurred the bizarre phenomenon of an army chief, Gen. Waheed Kakar, dismissing both the then president, Ghulam Ishaq Khan,

a The exception was Gen Yahya Khan’s two-year tenure, from March 1969 to December 1971.

and the elected prime minister, Nawaz Sharif.^{b,4} On certain occasions, the civilian government has also sought to strike back, as was seen in October 1998, when Army Chief Jehangir Karamat was pressured into resigning after he publicly criticised Prime Minister Sharif's administration.⁵ But Sharif soon got his comeuppance, being incarcerated in chains barely a year later in October 1999 by Gen Karamat's successor, Gen Musharraf.^c

In May 2006, while Benazir Bhutto and Nawaz Sharif were both in London in political exile, they concluded a 'charter of democracy', pledging to work to establish genuine democracy in Pakistan and promising not to destabilise each other when either was in power—a resolve they soon forgot when political fortunes turned.⁶

The hiatus between the civilian executive and the military was once again brought into sharp focus by the so-called 'memogate affair'. Soon after Osama bin Laden was eliminated in a US commando raid on Abbotabad on 2 May 2011, the then Pakistani Ambassador to the US was peremptorily sacked at the Army's behest. The Army was furious over his alleged role in sending a secret memorandum (hence 'memogate') to US authorities, expressing fears of a military takeover and seeking assistance to keep the civilian government in power, even offering the US intrusive inspection over Pakistan's nuclear assets in return.⁷

The controversy saw then Army Chief Gen Ashfaq Pervez Kayani and the Director General of Pakistan's Inter-Services Intelligence (DG, ISI) Ahmed Shuja Pasha file an affidavit before Pakistan's Supreme Court—which had been tasked to investigate 'memogate'—through Defence Secretary Lt Gen Naeem Khalid Lodhi, without the approval of either Defence Minister Ahmad Mukhtar or Prime Minister Yousuf Raza Gilani. In response, Gilani dismissed Lodhi and brought in the Cabinet Secretary Nargis Sethi, a civilian bureaucrat, to hold dual charge of Defence. He later lamented in a forceful speech in Pakistan's National Assembly that no organ of state should behave like "a state within the state".⁸

In October 2016, during a meeting of civilian and military heads in Prime Minister Nawaz Sharif's office, some of the former blamed the ISI for not doing enough to control select terrorist groups active in Punjab. This boiled over into another controversy once Cyril Almeida of *Dawn* newspaper found out and reported it, sparking Army fury at the leak, which it called a grave lapse of national security.⁹

Almeida was briefly put on the Exit Control List, which prohibited him from leaving the country, while Sharif was forced to sack Information Minister Pervaiz Rashid. But the upheaval also had a curious tailpiece, in that eight months later, following the submission of an enquiry report by an official committee—headed by retired judge

b Following major differences between them, then President Ghulam Ishaq Khan dismissed then Prime Minister Nawaz Sharif's government, charging it with corruption and misgovernance. A constitutional crisis arose after Sharif challenged the dismissal and Pakistan's Supreme Court upheld his plea and reinstated him, claiming the president had exceeded his powers. Army Chief Kakar responded by dismissing both Khan and Sharif.

c Sharif would later be banished to Jeddah under a deal with the Saudi monarchs.

Amir Raza Khan and included representatives of the ISI and Military Intelligence—Nawaz Sharif sacked his Special Assistant for Foreign Affairs, Tareq Fatemi. Promptly Maj Gen Asif Ghafoor, Director General, Public Relations at the ISI (DG ISPR) tweeted that the PMO’s ‘notification’ was being rejected.¹⁰

With Sharif thus falling foul of the Army—as PPP chief Benazir Bhutto had done earlier—a fresh alternative had to be found. A new hybrid model was thus rigged up by the Army from 2014 onwards, promoting the charismatic, cricket World-Cup winning team captain, Imran Khan, as the new political figurehead in the July 2018 elections. However, this experiment too soured after the Army tired of Khan’s perceived incompetence, unpredictability and megalomaniac predilections. But after his ouster—orchestrated through a constitutionally valid ‘no confidence’ vote in April 2022—Imran Khan responded with unexpected defiance, branding army generals as “traitors, animals or slaves” in public fora, relentlessly pursuing his return to political power. The Army found it intolerable, leading to an unprecedented joint press conference by then DG, ISI Lt Gen Nadeem Anjum and DG, ISPR Lt Gen Babar Iftikar in October 2022, declaring that the Army’s honeymoon with Khan had ended.¹¹

However, Imran Khan’s victimisation, especially his imprisonment since August 2023 on various charges, has not gone down well with either the US or Saudi Arabia, Pakistan’s prime global supporters. Urban youth and the middle classes

have also rallied in Khan’s favour, leading to his party Pakistan Tehreek-e-Insaaf (PTI) securing the maximum number of seats by a single party in the delayed 8 February 2024 National Assembly elections.^d It was a huge blow to the Army’s credibility and future.

Some analysts see the persisting support for Imran Khan as evidence of a change in Pakistan’s politics. The view is that at last people are rejecting a system that has ignored and abused them, being utterly frustrated with a political landscape dominated by corrupt dynastic politics, an interfering army, and disrespect of popular will. Many have also spoken out against the increasing legitimacy hybrid military-civilian governance has been acquiring. As Babbar Sattar, a prominent dissenting judge of Islamabad High Court, has pointed out, “The military’s role in politics is a matter of governance design that impacts what role we assign to the Constitution and rule of law in this country, to democracy, to separation of power and sustainable institutional evolution, and to the military.”¹² He asked: “Do we wish to entrench and legitimize this hybrid model as our de jure system of governance? Or are we still justifying the hybrid model on grounds of necessity?”

Similarly, Pakistani scholar Aqil Shah has noted, “The military has tried to sustain this carefully curated halfway house between democracy and dictatorship by curbing every avenue of dissent and opposition... used its rivalry with India to legitimize its political and economic power and

^d However, it was the two other main competing parties, Nawaz Sharif’s Pakistan Muslim League (Nawaz) and the PPP which jointly achieved a majority in the national assembly and formed a coalition government.

to place itself above reproach,” and “is run(ning) the country from behind the thinnest façade of civilian rule Pakistan has ever seen.”¹³

As early as in May 2021, former Pakistani Inspector General of Police Tariq Khosa had observed in a column in *Dawn*, “Frequent military rule has resulted in erosion of democratic institutions,” leading to “constant tension, and an undercurrent of mistrust between the military and civilian leadership.” He had noted that while the military projected itself “as defender of national interests, leaders of political parties, feudal barons and business tycoons are perceived as defenders of special interests.” Two years before that, in August 2019, then Prime Minister Imran Khan had extended the tenure of then Army chief Qamar Javed Bajwa, who would have retired in November 2019, by another three years. Criticising the extension, Khosa had added, “If they (the political leadership) think that by giving extension in service to army chiefs, they can attain stability of tenure and promote the mantra of civilian and military on the same page, they are sadly mistaken.”¹⁴ Khosa’s words proved prophetic as Bajwa was later accused of conspiring with opposition political parties to oust Khan.

In the same vein, academic and former civil servant, Ayesha Siddiqa, has referred to “two sets of relationships” emerging, “(a) between the military government and the civil bureaucracy, and (b) between political regimes and the civil bureaucracy,” which suffered from “trust deficit at both ends”. “Pakistan’s political class never built a partnership with the civil bureaucracy to push back interference from the military,” she noted.¹⁵ However, she maintained that the current crisis

was “fundamentally different from apparently similar ones in the past when political parties used to vie with, even conspire against, one another” for favours from the military establishment. There had been “a historic role reversal”, she said, where the Army’s failures in imposing different hybrid models, were being questioned by discerning critics in civil society, leading to developments “riven with deep contradictions and conflicts”, that were spawning “a new round of instability and uncertainty.”¹⁶

No doubt, the Army leadership too is not impervious to this adverse pulse of evolving civil society sentiment. It has attempted cosmetic course corrections. Both former Army chiefs Bajwa and Kayani, for instance, have acknowledged “mistakes made in the past”. Emphasising that the “armed forces draw their strength from the bedrock of public support,” they have cautioned against “any effort to wittingly or unwittingly draw a wedge between the people and the armed forces of Pakistan,” warning that it would be tantamount to “undermining the national interest.”¹⁷ After his retirement in November 2022, Bajwa even admitted to meddling in politics by the Army for decades and promised it would refrain from doing so henceforth¹⁸—a promise his successor Asim Munir promptly belied.

Munir’s appointment to the top slot was fortuitous, coming just two days before he was due to retire on 29 November 2022. Imran Khan, who lost his prime ministership in April 2022,^e has alleged that Munir’s promotion was the result of a secret meeting in London between Munir and the Sharif brothers shortly after Khan had removed Munir from his position as DG ISI in

e He was replaced by Nawaz Sharif’s brother, Shehbaz Sharif.

June 2019. It was allegedly during that meeting that the Sharif brothers promised to make Munir Army chief in return for destabilising Khan if they got back to power. But Munir's appointment^f has also had its repercussions, with two Lieutenant Generals seeking compulsory retirement in protest, and one of them conspiring against him afterwards.

After the PTI's anti-army agitation of May 2023 following the first attempt to arrest Imran Khan, Munir has carefully positioned army generals personally loyal to him in crucial positions. But despite his extension and promotion as Field Marshal after the May 2025 clashes with India, his insecurity persists. This is clear in the changes he has engineered through the 27th Constitutional Amendment and various changes in Pakistan's Army Act, 1952, which together make the Army chief the head of all defence forces including the Navy and the Air Force, grant lifelong immunity to top military officers (and the country's President) from prosecution or arrest, create a judicial body—the Federal Constitutional Court (FCC)—parallel to the Supreme Court to decide on constitutional questions and fundamental rights, and more, all of which make his own position seemingly impregnable.

In June 2023, Pakistan also set up a Special Investment Facilitation Council (SIFC), headed by a two-star general, which further extends the Army's influence over the country's economic policies. Pakistan has almost made a tradition of

picking up globally renowned economists and bankers of Pakistani origin and making them finance ministers,^g perhaps to make it easier for the country to secure repeated loans from the International Monetary Fund (IMF). But such experts can do little without making structural changes in the economy that would affect the pelf of its military, feudal, and business elites.

Atif Mian, leading Pakistani-origin economist at Princeton, noted in his paper 'Five for Fifty: Toward an Economic Vision for Pakistan' that the country needs to average 5 percent growth for the next 50 years simply to achieve a per capita income equal to the world average.¹⁹ "What has held us back is not a lack of talent or effort, but the absence of a clear, sustained economic vision," he writes, adding that the single most important step it needs to take is "regime change – not in political terms necessarily, but in strategic policy."

Yet another spell of unrest followed by civilian rule might well arise to upset Munir's applecart. Still, the chances of the Army's role shrinking in the foreseeable future are low. The country's political and economic future is likely to remain more troubled than ever. The only consolation may come from Jigar Moradabadi's lines: *Ghame tule hayat se ghabra na ai jigar/Hai koi aisi sham jis ki sahar na ho* (Do not fret over the sorrows of current existence/Has there ever been an evening which did not culminate in dawn?)

^f The appointment was for a three-year term, since extended up to 2030.

^g These include Mahbub ul Huq in the 1980s and Shamshad Akhtar and Muhammad Aurangzeb in recent times.

The Pakistan Army: Modernisation and Doctrinal Thought

D. S. Hooda

The Pakistani Army was born out of the division of the British Indian Army following the partition of India in 1947. Units that had fought together on the battlefields of the Second World War parted ways in a spirit of comradeship and nostalgia. In their book, *Freedom at Midnight*, authors Larry Collins and Dominique Lapierre describe one such farewell. At the close of a reception for officers of the two armies at the Delhi Gymkhana Club, Brigadier (later Field Marshal) K. M. Cariappa said: “We are here to say au revoir and only au revoir, because we shall meet again in the same spirit of friendship that has always bound us together... We have been brothers. We will always remain brothers.”¹

The brotherhood barely lasted two months. War between the two armies broke out in Jammu and Kashmir in October 1947. While the two countries have followed sharply divergent political and economic paths in their post-Independence history, the hostility with which the Pakistan Army views India has remained constant.

Enduring Preoccupations

Article 245 of Pakistan’s Constitution states, “The Armed Forces shall, under the directions of the Federal Government, defend Pakistan against external aggression or threat of war, and, subject to law, act in aid of civil power when called upon to do so.”² The historical record, however, shows that three long-standing fixations have driven the Pakistan Army’s thinking and conduct over the past seven decades. The first is to wrest control over the part of Kashmir that is under Indian administration. The wars of 1947-48, 1965, and the Kargil misadventure of 1999 were initiated with this aim. The nurturing of terrorist organisations like Lashkar-e-Taiba and Jaish-e-Mohammed, which front the insurgency in J&K, was part of the same objective.

The second fixation is to display that Pakistan is the only country resisting Indian hegemony in South Asia. This is couched in the language of ensuring strategic stability. In an address at the London-based International Institute of Strategic

Studies (IISS) in February 2020, retired Pakistani Lt Gen Khalid Kidwai, a former Director-General of the Pakistani Army's Strategic Plans Division and responsible for the security of the country's nuclear assets, said, "Pakistan must shoulder the responsibility of maintaining the vital strategic balance in the conventional and nuclear equation with India as the critical determinant of the state of strategic stability in South Asia."³

The third fixation is to retain the Army's primacy in civil-military relations. The Pakistani Army has regularly overthrown elected governments and ruled the country directly, but even when not in power, it wields enormous influence in both domestic and foreign affairs. Pakistan's political leadership has meekly accepted the dominant role of the military. Defence Minister Khawaja Asif admitted in a June 2025 interview with *Arab News* that the country is governed under a "hybrid model" and "the only realistic option" for the ruling political establishment is "to compromise with the military."⁴

Organisational Structure

The Pakistani Army, with a strength of approximately 560,000, is the dominant force in the military. It is led by a four-star General (although the current incumbent is a field marshal) who exercises direct operational control. The army's field forces are built around nine corps, each led by a lieutenant general and comprising two to four divisions plus independent brigades. The Army has also raised two ad-hoc commands, Central and Southern, which are commanded

by the Corps Commander of 1 and 2 Corps, respectively.

Five of Pakistan's nine corps are earmarked for defence of the India-Pakistan border. Two others (1 and 2 Corps) are designated as offensive corps to take the battle into Indian territory. 11 and 12 Corps are focused on the Afghanistan border and are currently heavily involved in counterterrorist operations in Khyber Pakhtunkhwa and Balochistan. In a war with India, however, these two corps will also pivot to the eastern border in a defensive/offensive role.

The Army Air Defence Command, which holds the tactical air defence weapons, is headquartered in Chaklala, near Rawalpindi. The Army Strategic Forces Command is also at Chaklala and controls both nuclear and conventional land-based ballistic and cruise missile systems. Pakistan has recently announced the raising of the Army Rocket Force Command (ARFC). The ARFC will take control of all conventional ballistic and cruise missiles and the long-range multiple rocket systems.⁵

The Pakistan Rangers and Frontier Corps are paramilitary organisations formally under the Ministry of the Interior but functionally controlled and led by officers from the Pakistani Army. The Rangers are tasked with guarding the eastern border with India and providing internal security support. The Frontier Corps, almost 80,000 strong, carries out border management and counterterrorism operations along the western border. During war, both organisations will come under operational control of the Army.

Modernisation Efforts

Pakistan's total defence expenditure in its latest federal budget (including pensions and strategic procurements) is approximately US\$12.6 billion.⁶ The Army receives 46 percent of this budget, but the amount is still modest compared to that of India (~ US\$85.6 billion for FY26-27).⁷ Despite this, the Pakistani Army has been able to selectively modernise its force, primarily with assistance from China. Pakistan's defence industry, though lean and state-centred, has substantial strength in areas of co-development, and those where transfer of technology is available.

Some specific areas of modernisation are described in the following points:

- In 2019, Pakistan signed a contract for 679 VT-4 tanks from China,⁸ around 200 of which are in service. In March 2024, it unveiled an indigenously produced VT-4, renamed Haidar. The VT-4 is comparable to the T-90 tank in firepower and mobility, but has a slight edge due to hard-kill protection and upgraded electronics.
- Artillery systems: Pakistan will receive 236 SH-15 self-propelled howitzers from China, deliveries having commenced in 2022.⁹ The Army also has a variety of multiple launch rocket systems, including the Chinese A-100 and the indigenously developed Fatah-1 and Fatah-2, the latter with an estimated range of 400 km.
- Pakistan's modern air defence systems are all of Chinese origin. These include the HQ-7, HQ-16, and HQ-9, with ranges from 15 to 125 km.
- The Army has inducted the Chinese-built Z-10ME attack helicopters into its combat aviation fleet.¹⁰ This is seen as a response to India's acquisition of the AH-64.
- Pakistan has an extensive Unmanned Aerial Vehicle (UAV) fleet for both recce and strike roles. These include the Bayraktar Akinci, and the Asisguard Songar (both from Türkiye), the Chinese-made CH-4 and Wing Loong II, and the indigenously produced Shahpar and Burraq. The long-range UAVs are held by the Pakistan Air Force.

With a majority of its weapon systems coming from China, the Pakistani Army is assured of a reliable supplier with timely deliveries. Joint production and transfer of technology is also a boost to Pakistan's indigenous defence industry. Most importantly, with a common ecosystem, networking of different platforms enhances combat effectiveness.

Doctrinal Developments

Between 2009 and 2013, the Pakistani Army conducted four Azm-e-Nau joint military exercises, which led to the adoption of a doctrine it called 'New Concept of War Fighting' (NCWF). The NCWF is designed to blunt India's 'Cold Start Doctrine' and the growing conventional disparity between the two countries.

The main features of the NCWF strategy are:

- Mobilise faster than the Indian Army to foil any initial success of ‘Cold Start’, which relies on speedy, shallow incursions.
- Create additional defensive reserves at all levels to limit the depth of penetration by India’s offensive corps.
- Employ the strategic reserves of the Central and Southern Commands for a riposte across the international border into Indian territory.

Pakistan has also adopted a ‘Full Spectrum Deterrence’ approach to nuclear weapons, which Gen Kidwai once explained as follows: “Pakistan’s full-spectrum deterrence capability, while remaining within the larger philosophy of credible minimum deterrence, comprises horizontally of a robust tri-services inventory of a variety of nuclear weapons. Vertically, the spectrum encapsulates adequate range coverage from zero meters to 2,750 km, as well as nuclear weapons’ destructive yields at three tiers: strategic, operational, and tactical.”¹¹

While Pakistan believes that the NCWF, backed by its Full Spectrum Deterrence, would be a foil to India’s conventional superiority, it also has a declared policy to counter the more limited strikes by India, such as those in Balakot in February

2019 or the recent Operation Sindoor in May 2025. Pakistan defines this as ‘Quid Pro Quo Plus’, implying that if India conducts a limited conventional strike, Pakistan will respond in kind, plus one notch higher to impose greater cost.¹²

Quid Pro Quo Plus strategy is an attempt to restore deterrence by declaring that Pakistan is willing to climb the escalation ladder. No doubt, given the losses suffered by Pakistan during Operation Sindoor, the success of this strategy in future encounters with India is very much in doubt. Even so, it would also be naïve of Indian planners to think that a limited strike by India across the border would not meet a retaliatory response from Pakistan.

Conclusion

Pakistan’s land forces remain India-centric in identity and structure. The Pakistani Army considers itself the uncompromising defender of the nation from India. It also feels that it can deal with any limited military action by India, and its nuclear weapons rule out a full-scale war—escalation is manageable. However, with each India-Pakistan crisis from 2016 to 2025 seeing an expanding use of military force, these assumptions could be severely tested in a future conflict.

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A Capacity and Capability Assessment of the Pakistan Navy

Sarabjeet S Parmar

There are four traditional roles that any navy is required to fulfil: military, diplomatic, constabulary, and benign, which refers to soft power tasks like humanitarian assistance and disaster relief, search and rescue, hydrographic survey, and aid to civil authorities. Seminal doctrine and strategy documents that flow from higher-level directions stipulate the methodology of fulfilling these roles. Doctrines cover concepts that drive the strategies and operational plans of a navy.

However, certain concepts, such as Sea Control, that require a substantial number of assets may be beyond the existing capacity and capability of the navy. Strategies link the means and the ends: first, to meet the stated objectives or goals, and second, to safeguard national interests by securing the national maritime interests. This article seeks to assess the capacity and capabilities of the Pakistan Navy (PN) by analysing the roles of the military

and diplomatic machinery, as well as existing doctrine and strategy documents.

The Centrality of Doctrine and Strategy

The absence of either the doctrine or strategy documents can limit the PN's performance, resulting in a lack of clarity in the rank and file. Any overreach, especially in the strategy document, would indicate an erroneous linking of the means to the ends, and therefore impact the securing of national maritime interests and, in turn, the safeguarding of national interests. The first Maritime Doctrine of Pakistan (MDP), subtitled 'Preserving Freedom of Seas', was published in 2018. The National Security Policy (NSP) 2022-2026—Pakistan's first national security policy document—covers a vast and ambitious ambit and mentions the negative impact of India's net security provider role in preserving the Indian Ocean's security and economic interests.

The absence of an unclassified maritime or naval strategy, which is contrary to global best practices adopted by many navies, limits the PN's strategic transparency and risks a disconnect between doctrinal concepts, strategic ambition, and operational reality. Pakistan's 2018 MDP is insufficiently supported by a concrete roadmap for capability development, force sustainment, and crisis response in the Indian Ocean Region (IOR). A more pragmatic and resource-linked strategy is required to ensure that doctrine does not outpace the Navy's actual means. Thus, the absence of an unclassified maritime or naval strategy, which most nations make accessible in the open domain,^a is reflective of the limited operations that the PN is capable of. The rest of this article analyses two primary naval roles: military and diplomatic, covering the salient points, although the MDP indicates only three of them: military, law enforcement, and benign.

Military Tactics and Realities

Since independence, the asymmetry between the military forces of Pakistan and India, especially the navies, has been an important focus area for the former. This has resulted in the PN focusing on defensive operations, a result of a more land and air-based orientation, forming the basis for the limited forays of the PN during operations in 1971, the Kargil War, Indian Naval deployment during OP Parakram, and recently, Operation Sindoor. The focus on Sea Denial and Area Access and Area Denial (A2AD) is therefore the

central concept of PN operations. This resulted in Pakistan procuring submarines before India, and the impact of Sea Denial in the 1971 war has been cited in the MDP.

Sea denial capabilities, with the possibility of the threat of use of Tactical Nuclear Weapons (TNWs) in the future to enforce A2AD, cannot be ruled out.¹ Sea denial and A2AD capabilities like submarines and unmanned autonomous systems are a cost-effective method to address the existing asymmetry of the PN against a superior adversary like India, while retaining limited offensive capabilities.² Therefore, future procurement of appropriate sea denial and A2AD capabilities, especially autonomous and unmanned air, sea-surface, and underwater vessels from China³ and Türkiye,⁴ could increase. However, the serviceability status and availability of Chinese-supplied military assets and equipment have been areas of concern for the Pakistan military.

The case of faulty frigates⁵ and recent inputs about the serviceability of Harbin Z-9EC Anti-Submarine Warfare (ASW) helicopters have heavily impacted the ASW capability of the PN.⁶ This heavy reliance on China for equipment, as well as serviceability and availability issues, may lead to Pakistan looking elsewhere, apart from Türkiye. Therefore, the recent fraying of relations between the US and India⁷ could lead to a resumption of military assistance to Pakistan and would need to be monitored.

a For example, India updated the 2015 strategy in 2025 and placed it online. See, Ensuring Secure Seas: Indian Maritime Military Strategy 2015, https://bharatshakti.in/wp-content/uploads/2016/01/Indian_Maritime_Security_Strategy_Document_25Jan16.pdf; and Ensuring Secure Seas: Indian Naval Maritime Military Strategy 2026, https://indiannavy.gov.in/sites/default/files/2026-04/Book_Indian%20Navy%20Maritime%20Security%20Strategy_Version6_ver3-3_web_0.pdf

The Navy in Diplomacy

Although the MDP refers to naval diplomacy and the role of the PN as a tool of Pakistan's foreign policy, the diplomatic role seeks to balance the weakness of the military role through maritime engagement with other navies. The biennial Aman series of exercises, started in 2007, saw the 2025 version boasting the participation of 60 nations. It is, however, yet to deliver the required dividend of equalling multinational exercises conducted by India and other nations due to limitations of infrastructure, finances, resources, modern naval assets, and port facilities.⁸ This exercise is viewed as a response to India's biennial series of MILAN exercises, which have evolved successfully over the years. However, Pakistan's bilateral engagements with nations like China, Türkiye, Saudi Arabia, and Iran are of particular concern.

The January 2024 maritime exercise between the PN and the Iranian Navy in the Persian Gulf could thrive on the slow decline of India-Iran relations. Further, the thawing of relations between Saudi Arabia and Iran could foster more maritime engagements between Pakistan and Saudi Arabia, as well as other Gulf nations. Türkiye's increasing support to Pakistan, with the growing supply of military equipment during the India-Pakistan four-day conflict (Operation Sindoor) in May 2025, indicates the strength of the relationship. The visit of a Turkish ASW Corvette to Karachi from 4 to 7 May 2025 as a neutral warship could have restricted Indian attacks on the port during Operation Sindoor.

There could be increased interaction between the PN and Turkish navies now that Türkiye has open access to the Indian Ocean Region (IOR) through Somalia.⁹ China's support to Pakistan is well documented. Thus, the presence of Chinese and Turkish maritime assets in Pakistani ports and maritime zones, especially during times of high tension or short conflicts, would balance its lack of naval offensive capability while strengthening its defensive posture. The status of a major non-NATO ally and the ongoing warming of relations between the US and Pakistan could be another balancer with which Pakistan seeks to bolster its diplomatic arsenal, especially after the US rebuke in the aftermath of the 1999 Kargil war. In the maritime domain, it could seek US intervention to limit India's maritime offensive capability.

Conclusion

The PN's current capabilities underscore the operational reality that it is not a blue-water power but a defensive, regionally-focused naval force whose doctrine and strategy are shaped by persistent asymmetry with the Indian Navy. This asymmetry has compelled the PN to centre its warfighting concepts around Sea Denial and A2AD, leveraging submarines, unmanned platforms, and selective surface combatants as cost-effective deterrents. However, overreliance on Chinese and, increasingly, Turkish defence supply chains, combined with recurring serviceability problems with Chinese assets and equipment, creates operational vulnerabilities that could be exploited in any crisis or conflict, especially protracted ones. Without a robust domestic defence

industry; maintenance, repair, and overhaul (MRO) infrastructure; and the diversification of suppliers—the PN risks significant capability degradation at decisive moments.

Diplomatically, Pakistan's use of the PN as a tool of foreign policy, through exercises like Aman, and bilateral engagements with China, Türkiye, Iran, and the Gulf states, has given it visibility but not the decisive strategic leverage that India's more mature maritime diplomacy enjoys. For these engagements to deliver real

security dividends, Pakistan has to move beyond symbolic exercises toward deeper interoperability, intelligence sharing, and logistics support agreements with select partners. The evolving Saudi–Iran rapprochement, Türkiye's growing IOR footprint, and a possible recalibration of US–Pakistan relations present opportunities for the PN to strengthen its deterrence and defensive posture without directly competing with India's navy, and therefore they need monitoring.

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Fiza'Ya: The Myth and Reality of the Pakistan Air Force

Diptendu Choudhury

“The Pakistan Fiza’Ya (Pakistan Air Force) plays a role in the psyche of its nation unmatched by any air force in the world except that by the Israeli Air Force.

The PAF’s motto, loosely translated from Persian is ‘Lord of All I Survey’. It calls itself ‘The Pride of the Nation’, and is exactly that.”

~ Pushpindar Singh¹

The Pakistan Air Force (PAF), the “pride possession of Pakistan,”² has been inexorably entwined with the Indian Air Force (IAF) since its inception. The overarching vision of the *Quaid-e-Azam* (‘great leader’) Mohammed Ali Jinnah was to serve as a beacon for the PAF, when, in his address at the Flying Training School at Risalpur, he said, “There is no doubt that any country without a strong Air Force is at the mercy of any aggressor. Pakistan must build up her Air Force as quickly as possible.”³

The Expansion of the PAF

Following Independence and after the first round of war in Kashmir in 1947-48, Pakistan was looking to strengthen its military and signed a Mutual Defense Assistance agreement with the United States (US). In return for the use of PAF bases for launching reconnaissance flights into the then Soviet Union, the US, by mid-1957, agreed to provide six fighter-bomber squadrons, one day-interceptor squadron, one light bomber squadron, one transport squadron, one jet conversion school, one air rescue flight, one reconnaissance flight, and equip the country with a flying training academy, radars and navigational aids, and various other maintenance, logistics, and administrative aid.⁴

In Pakistan's 'aid era' between 1954 and 1965,^a the US provided 120 F-86F Sabre fighters, followed by 26 B-57B Canberra bombers in 1959, and 12 F-104A in 1962. Though these were the best aircraft available in terms of technology, their size always remained an area of serious concern to the PAF. This not only shaped its operational philosophy, but also became the overarching reason for it to "preserve" its strength in its wars.⁵

Unlike the IAF, which was formed as an independent service, the PA's shadow impacted the PAF's operational role. This Army-dominant approach continued through the 1965 war under then President Ayub Khan who, according to Air Marshal Asghar Khan, "understood little of air operations" and "preferred to see the Air Force as an Arm of the Army, an airborne form of artillery whose role should be to clear the way for the Infantry and Armour."⁶

In the Army's Shadow

The differences in the perception of the role of the PAF and its divide with the Army showed themselves in the 1965 war with India. This divide led to the absence of any joint planning, and the PA plans neither included PAF participation nor assigned any role to it. Later, General Zia Ul Haq, who took over in a coup in 1977 and assumed the presidency in 1978, was responsible for the armed forces functioning as a well-knit team. He had the active support of the PAF as he was sensitive

to the requirements of the smaller services and was able to resolve competing military demands amicably. This changed with his demise.

In the decade that followed with Gen Zia at the helm of the nation, the Pakistan Army actively became involved in the politics of the nation. Consequently, the politicised Army had taken control as the dominant service, with the PAF seldom getting its due either in national security or in defence procurements.⁷ This trend was set to continue even in Kargil. According to journalist and writer Nasim Zehra, in 1999, the civilian leadership, the Air and Naval Chief were briefed on Operation Koh Paima for the first time on 16 May 1999,⁸ after the operation planned secretly by the clique of four Generals had already begun. It was only after the plan had started to unravel with the IAF getting engaged offensively that PAF involvement was sought, which the Pakistan CAS opposed.⁹

It was clear that, in Pakistan, the military had the final say in all matters of national security, and all security-related decisions for all services rest with the Chief of Army Staff (COAS).¹⁰ Even to this day, PAF policy decisions are also determined by the COAS, with inputs from the Chief of Air Staff (CAS). Therefore, the final decision-maker for air power policy is not the CAS, but the COAS.¹¹

a Pakistan became a signatory to the Southeast Asia Treaty Organization (SEATO) in 1955, and the Central Treaty Organization (CENTO) in 1955, the two US-led Cold War military alliances established to contain Soviet expansion. This alignment opened the floodgates for the first major influx of US economic and military assistance and enabled the rapid modernisation of the PAF especially.

IAF: The Only Enemy

Pakistan's geography and the deployment pattern of the PAF drives its security approach, operational strategy, and psyche. Its lack of strategic geographical depth, which makes it vulnerable to IAF's offensive reach and capability, is a critical military concern. Thus, despite having a front tier of airfields, it chose to operate from its depth bases to keep its aircraft away from the easy reach of IAF bases. It thrives on a narrative of Indian misadventures, where the IAF was defeated by the numerically inferior but professionally superior and aggressive PAF—a myth perpetuated by the absence of Indian official war records in the public domain, the partisan writings of John Fricker in his book 'Battle for Pakistan',¹² and the pro-PAF narratives amongst the Western strategic community and air power practitioners.

The country's smaller size has been used effectively to its advantage in the PAF history in its accounts of the 1965 war, to build the image of a heroic David fighting against a Goliath and emerging victorious. Therefore, despite the technologically advanced inventory and the claimed superiority of PAF pilots in training and motivation, IAF pilots displayed better air combat performance.¹³ Air Commodore Sajjad Haider, who participated in both the 1965 and 1971 wars against India, gives a more sober perspective: "In spite of the fact that more than four decades have elapsed since the 1965 war, the real truth is not common knowledge and hence the truth must remain the biggest casualty in the tragedy of errors played out by the leaders of that period. Like most wars, the 1965 was an avoidable catastrophe. It was horrendously senseless and falsely contrived to appear as a victory. Only those

martyred and their neglected, ravaged kin had to pay the terrible price for this farce. The legacy of the 1965 tragedy perpetrated 'a bigger watershed' in 1971."¹⁴

A realistic assessment disproves the myth of PAF superiority and its performance in both wars. The facts and figures clearly highlight that the IAF prevailed upon the PAF in both wars and that the latter's performance was dictated by its need for self-preservation. Unfortunately, India chose to end both wars without taking them to their logical conclusions of total military victories, despite the advantage of force ratios. This gave the PAF the respite it needed, enabling it to survive and subsequently perpetuate the perception of victory in its air wars. In reality, it stuck to its aim: defence and the preservation of its Air Force in the face of two national defeats.

Maintaining Relevance

The PAF not only played an active role in its wars, it was also used extensively from a political perspective in the war against the Soviet Union in Afghanistan. Even at the cost of its own internal challenges, Pakistan became actively involved in the future of Afghanistan by denying airspace usage to the Afghan and Soviet aircraft involved in targeting Mujahid deployments. Nine squadrons of the PAF took part in combat air patrol missions flying over 10,000 missions on F-16 fighters, shooting down eight Soviet aircraft.¹⁵ This had two outcomes: the first being the continued supply of and support for US-supplied fighters, and the second was to gain rich combat experience to its advantage in operational preparedness and morale. It has continued to remain in operational touch by employing air power offensively in counterinsurgency operations in the Khyber Pakhtunkhwa and Balochistan regions.

Once the Soviets pulled out from Afghanistan, the US withdrew almost all assistance to Pakistan in line with the mandate of the Pressler Amendment. However, many of the policymakers and military leadership of the US government retained warm feelings toward Pakistan. The post-9/11 landscape saw relations being revived, given Pakistan's active support to the US military campaign in Afghanistan and cooperation in counterterrorism initiatives. The PAF benefited the most with the receipt of 14 F-16As in 2005 and 18 F-16Cs in 2007, amidst "the surge of both security and economic assistance almost as large as that delivered during the peak of the Cold War."¹⁶

The masterful balancing of its relationship with its 'iron-brother'¹⁷ China allowed the Sino-Pakistan defence collaboration to flourish as the two countries subsequently collaborated on important projects. The Aircraft Manufacturing Factory (AMF) under the Pakistan Aeronautical Complex (PAC) at Kamra began production, and the co-development of the K-8 trainer and the JF-17 fighters ensued. It also procured the Swedish Erieye and the Chinese-built ZDK-03 Airborne Early Warning and Control Systems (AEW&C)¹⁸ to enhance its air defence. Over the last decade, deliberate efforts were undertaken to weave its AEW&C and fighter platforms and weapons into a cohesive networked system of systems via its Link 17 tactical data-link system. There are hopes that, over time, data-link connectivity will be established between the three services.¹⁹

China understands the coercive capability of air power and thus recognises India's asymmetric air power advantage.²⁰ To close the gap, it is rapidly expanding infrastructure and assets in Tibet, and has been conducting Ex-Shaheen, a dedicated series of air exercises with Pakistan for over a decade,²¹ towards interoperability between the two air forces. In his visit to Pakistan in August 2020, General Xu Qiliang, Vice Chairman of China's Military Commission, inaugurated the Centre for Artificial Intelligence and Computing (CAIC) at the PAF HQ in Islamabad. General Xu is said to have succeeded in impressing upon Pakistani military leadership the significance of making the PAF the lead service in the war, and the PLA was ready to share select virtual war domains capabilities with the PAF for war in North Kashmir and Ladakh regions.²² Active cooperation between the two against India in the recent Operation Sindoor^b is a harbinger for future conflicts.

Balakot and After

The IAF's ability to breach the PAF's vaunted AD system in the 'Balakot strike' on Jabba Top in February 2019, and the latter's inability to strike Indian targets in their followup Operation Swift Retort, highlighted the doctrinal and operational limitations. Given the challenges ushered in by wavering US support, the PAF opted for the Chinese J-10CE to augment the F-16 and JF-17 fleets. Public statements of their interior minister and other Pakistani commentators claim that

b Operation Sindoor was a series of precision military and missile strikes launched by the Indian Armed Forces in May 2025 against nine terror-linked sites in Pakistan and Pakistan-Administered Kashmir. It was executed as a calibrated and non-escalatory response to the Pahalgam terrorist attack.

the Balakot incident, and India's government-to-government acquisition of 36 Rafale fighters, led to the fast-tracked J-10 fighter procurement with PL-15 beyond Visual Range Missiles from China.²³ Pakistan was the second largest recipient of Türkiye's arms exports between 2020 and 2024. The latter is also upgrading F-16s for Pakistan and has supplied Bayraktar TB2 and Akinci drones, and is in active collaboration for scaling up productions.²⁴ Pakistan is not only collaborating with Türkiye on a fifth-generation fighter, Kaan; it will also induct the Chinese 5th-Gen J-31 fighter well before the IAF gets its 5th-Gen Advance Medium Combat Aircraft (AMCA) in mid-2035.

In Operation Sindoor, several aspects of the PAF remained true to form, as it yet again hyphenated its perception of success with incorrect claims of its air-air engagement with the IAF. In reality, it was unable to defend its airspace as well as its

assets in the air and on the ground from the IAF's coercive offensive targeting that had the right balance of punitive signalling and escalation control. Heavy losses in a mere 90-hour conflict underscored the limitations of the PAF's strategy and showcased its inability to defend Pakistan's territory and airspace.

As in the past, the PAF fell back to its depth bases to preserve itself, deterred by the IAF's doctrinally validated offensive AD strategy. However, true to its character, the PAF's efforts are underway to expeditiously cover its losses, fill its gaps, and, in what is a matter of grave concern, seek to avenge itself with the ability to strike India in depth. New Delhi will do well to recognise that the PAF remains an important player in its military and political strategy, and will likely leverage its relevance in the current waxing of relations with the US as Pakistan continues to balance China to its advantage.

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Pakistan's Nuclear Strategy of Deterrence Through Brinkmanship

Manpreet Sethi

Few nuclear-armed countries have the luxury of crafting a nuclear strategy centred on addressing a singular threat. Pakistan is one of them. Its nuclear strategy is wholly and solely India-centric. Pakistan's nuclear weapons, however, are meant not to deter India's nuclear-weapon use. They are meant to deter the possibility of a conventional war with India. This is a greater risk for Rawalpindi, given that Pakistan supports acts of cross-border terror to keep India unsettled and fears the possibility of an Indian response. This response is sought to be deterred by projecting the inevitability of nuclear escalation, in case a conventional war were to begin.

Pakistan uses the risk-of-escalation threat to achieve two objectives: one, to deter India from using its superior conventional military capability to punish Pakistan for supporting a terror strike; and, two, to magnify the fear of a nuclear holocaust for the international community. The Pakistan military works on the assumption that a 'concerned' international community (especially the United States) would restrain India from

using military force. In Pakistan's perception, its own nuclear weapons grant it both, the immunity to execute the strategy of "bleeding India through a thousand cuts", and an instrument to constrain India's response. In other words, the purported fear of slipping into a nuclear war is meant to inject caution into any Indian action, while simultaneously allowing a free hand to Pakistan to continue to exploit terrorism.

This strategy of nuclear brinkmanship appears to be irrational. It is this irrationality, however, that Pakistan seeks to exploit for its deterrence. Indian nuclear retaliation can pose an existential threat to Pakistan. A stark example was provided by Chief of Army Staff Field Marshal Asim Munir in August 2025. At a dinner hosted by Pakistan's honorary consul in Tampa, Florida, Munir addressed the gathering and said, "We are a nuclear nation. If we think we are going down, we'll take half the world down with us."¹ By linking conventional action to an automatic nuclear escalation, Pakistan thus creates space for continued use of terrorism.

Its nuclear weapons, therefore, are a most precious strategic asset and perform several important and inter-connected tasks—they serve as a strategic equaliser with India, despite the latter’s military and economic strength; act as bargaining chips for military and economic assistance from the US and others; insulate Pakistan from a large-scale conventional attack by upholding Pakistan’s risk-of-escalation threat; and enable sub-conventional warfare.

The Role of State-Supported Terrorist Organisations

The utility of terrorist organisations as a low-cost tool against India became clear to Pakistan soon after its independence. Since then, these instruments have been consistently trained, equipped, supported, and repeatedly used by the Pakistani deep state. The acquisition of nuclear weapons, flaunted by the father of Pakistan’s atomic bomb, Abdul Qadeer Khan in 1987, has since lent strength to Pakistan’s strategy of using terrorism—by freeing it of the fear of a punitive Indian response.

There is no parallel of a nuclear strategy in which one nuclear-armed state uses terrorism against another nuclear-armed state, while exploiting the threat of a risk of escalation, to deter conventional military response. Through the articulation of an ambiguous doctrine, and the build-up to current capability levels, Pakistan—as a pre-emptive move—has always sought to amplify fears of an immediate and inevitable escalation after every incidence of terrorism that can be traced back to its territory.

Building a Commensurate Nuclear Arsenal

To give teeth to this strategy of brinkmanship, Pakistan has laboured to build the ‘right’ kind of arsenal that can adequately portray a sense of risks. Despite the nation’s economic crisis—which has repeatedly placed it in the ‘Grey List’ of the Financial Action Task Force—Rawalpindi has not let its nuclear build-up flag. According to figures provided by the International Campaign to Abolish Nuclear Weapons, the annual total spending of Pakistan on nuclear weapons in 2024 marked an 18-percent increase from the previous year.² Indeed, Rawalpindi has gone on honing the projection of having a low nuclear threshold by flaunting tactical nuclear weapons (TNWs); upholding a doctrine of full-spectrum deterrence; and announcing the concept of zero-kilometre-range nuclear weapons.

Pakistan first tested a very short-range ballistic missile, ‘Nasr’, on 19 April 2011 and declared it nuclear-capable. The Inter-Services Public Relations Directorate (ISPR) of Pakistan explained this development as necessary to “add deterrence value to Pakistan’s strategic weapons development programme at shorter ranges” and described it as a “quick response system”, capable of carrying “nuclear warheads of appropriate yield with high accuracy”.³ The Director General, Strategic Plans Division, witnessed the test and claimed that it had “consolidated Pakistan’s nuclear deterrence at all levels of [the] threat spectrum.”⁴

The idea of a low-yield nuclear weapon for possible use against targets in the battlefield appears to fit perfectly with Pakistan’s nuclear strategy of brinkmanship. During the Cold War, the North

Atlantic Treaty Organization's (NATO) argument in favour of TNWs was that "deploying nuclear weapons near the front makes their use virtually automatic and therefore denies the opponent the option of conventional war. He is left with the choice between not attacking or setting off a nuclear war that would be likely to get out of hand."⁵ Pakistan's nuclear strategy is operating on the same logic. Maleeha Lodhi, a former ambassador of Pakistan to the US, articulated in an article in November 2012 that the purpose of Pakistan's TNW was to "counterbalance India's move to bring conventional military offensives to a tactical level."⁶ Some Pakistan-watchers in the West too, such as Michael Krepon, co-founder of Stimson Center, have argued that Pakistan's "advertised possession of tactical nuclear weapons will further dissuade Indian leaders from authorizing limited incursions into Pakistani territory."⁷

As part of this strategy, the threat of use of TNWs is deemed more important than the actual use of the weapon. Indeed, Pakistan has no illusions about the military effectiveness of the weapon on the battlefield. As admitted by Pakistani strategists, AH Nayyar and Zia Mian, "The ability of low yield nuclear weapons to destroy Indian tanks is limited to the extent of being inconsequential because to cause substantial damage to a well-dispersed attacking armoured formation a large number of 15-20 kiloton yield weapons would be required."⁸ They understand that the loss of a few troops or tanks would matter little to the overall battle. But it is the novelty of the act and the demonstration of resolve that is believed to serve as a deterrent.

Pakistan premises its TNW strategy on a number of assumptions. One, that the threat of use of low-yield weapons on military targets would appear to be more credible than that of using larger-yield weapons against counter-value targets. Two, that such a threat would compel the international community to mount pressure on India to refrain from any conventional use of force against Pakistan, thereby enabling de-escalation of the situation. Three, that such use would cause little damage of military significance, thereby making India absorb the damage, rather than escalating to actual nuclear retaliation that would only beget more nuclear attacks from Pakistan.

Meanwhile, Pakistan is steadily moving towards its concept of full spectrum deterrence. The first prong of this is the ready stockpile of nuclear warheads that include both low-yield to high-yield varieties. The second prong includes the deployment of a number of delivery systems spanning from very short-range to longer-range missiles that can target all parts of India. In recent years, missile tests of new technologies such as MIRVed missiles from sub-surface platforms, and longer range, nuclear-capable cruise missiles have further fleshed out full-spectrum deterrence.

Among the most recent developments in support of brinkmanship has been the announcement of 'zero-km range' nuclear weapons, mentioned briefly earlier.⁹ It is a term that was coined by Khaled Kidwai in 2023 on the 25th anniversary of Pakistan's nuclear tests. This 'zero-km range' has been interpreted by Pakistani scholars to mean nuclear artillery shells, atomic demolition munitions, or nuclear landmines.¹⁰ This appears

to be an articulation in response to the threat of Indian incursions into Pakistan territory as punitive action against terror strikes. India had undertaken one such strike, a ‘surgical’ strike, in 2016. Pakistan seeks to prevent such actions in the future, by suggesting immediate nuclear escalation through deployment of nuclear landmines.

India, meanwhile, in its search for countering Pakistan’s strategy of brinkmanship and blackmail to shield terrorism—continues to expand space for conduct of punitive action against Pakistan-supported terrorist infrastructure. This has been repeatedly demonstrated—first in 2016 through surgical strikes across the line of control, then in 2019 through air strikes on a terrorist training camp in Pakistan’s Balakot in response to a terrorist attack on para-military forces in Pulwama in India; and most recently in 2025, in response to a terror attack on civilian targets in Pahalgam in April. The use of air strikes has enlarged India’s target list and the territorial envelope it can cover in Pakistan. The air strikes have not only demonstrated room for conventional action by India against Pakistan’s sub-conventional provocations, but have also exposed the limits of Pakistan’s nuclear strategy of crying wolf.

India has since openly declared that it will not be deterred by Pakistan’s strategy of nuclear brinkmanship and blackmail, nor will it carry the burden of risk of escalation alone. In doing so, India is not being sanguine about nuclear risks, but is refusing to let Pakistan be the only one manipulating the risks.

Pakistan likely understands that its nuclear strategy, premised on the projection of a low nuclear threshold through deployment of TNWs, is fraught with risks. If this risky strategy does not meet its purpose of deterring India and actually does lead up to nuclear escalation, then it would cause a catastrophe. India’s new normal believes that it is up to Pakistan, for its own sake, to avert such a possibility. In the face of this new reality, there may be a requirement for Pakistan to re-assess the value of its nuclear strategy in support of cross-border terrorism. While the terrorist organisations it supports may be a low-cost tool in Pakistani perception, its nuclear strategy, if not responsibly handled, could impose a very heavy price on the nation.

III

External Relations

The Strategic Foundations of Pakistan-China Relations

Sana Hashmi

The China–Pakistan relationship is often framed in governmental rhetoric as an “all-weather partnership” and an “iron-clad friendship”, celebrated through metaphors such as being “higher than the mountains, deeper than the ocean, stronger than steel, and sweeter than honey.”¹ While such expressions may appear to be neutral markers of goodwill, they function as political signals that project cohesion and mask the structural asymmetries underpinning the partnership. At its core, the bilateral relationship is shaped by Pakistan’s massive dependence on China and its strategic instrumentalism.^a

Islamabad relies heavily on Beijing for economic assistance, defence support, and diplomatic backing, whereas China supports Pakistan primarily to leverage its geographic position and achieve strategic objectives.² This asymmetry defines the objectives, scope, and limitations of the partnership. India remains central to this equation, with bilateral economic, military, and technological cooperation systematically directed at constraining New Delhi and reinforcing a two-front threat. Simultaneously, pressing concerns, including terrorism and Pakistan’s balancing act between China and the United States (US), are frequently downplayed. While the relationship is multi-dimensional, its public projection of strength overstates its resilience, concealing vulnerabilities arising from dependency and a shifting regional order.

a ‘Strategic instrumentalism’, in this context, may be understood as China’s use of its relationship with Pakistan primarily as an instrument or a proxy to advance broader regional strategic objectives, particularly balancing India and securing geographic access, rather than as a partnership defined by mutual symmetry or equivalence. China’s use of Pakistan as an instrument for achieving its objectives is explained throughout this article.

Strategic Foundations

Pakistan relies heavily on China across the economic, defence, and diplomatic domains, making Beijing an indispensable partner. China has also continued to support Pakistan despite the negative externalities associated with state-bred and -linked terrorism, the effects of which are felt more acutely by other countries in the region, particularly India. For Beijing, however, the relationship is largely strategic. Pakistan's geographic position and its role in balancing India make it a useful partner for China. This has created an uneven dynamic where Pakistan depends deeply on China, while Beijing engages Pakistan mainly to advance its own objectives. That imbalance lies at the core of the relationship.

This alignment stems from decades of strategic cultivation. China's early engagement with Pakistan began in the 1950s, when Mao Zedong described it as "China's southwestern gate."³ Over subsequent decades, China consolidated the partnership through military aid, diplomatic support, and strategic agreements, including the 1963 border settlement and Pakistan's transfer of the Shaksgam Valley to China, while also backing Pakistan during the 1965 Indo-Pakistan conflict.⁴ These historical foundations established Pakistan as one of China's most reliable regional partners, particularly following repeated instances of limited US support during conflicts with India.⁵

Under Chinese President Xi Jinping, the relationship has been recalibrated to align more closely with Beijing's strategic priorities in the Indian subcontinent. In 2015, ties were formally elevated to an "all-weather strategic cooperative partnership."⁶ This was one of the first signals of Xi's intent to further institutionalise and deepen the bilateral nexus. China has been Pakistan's largest trading partner since around 2010s, with bilateral trade reaching approximately US\$23.5 billion in 2025. Xi's Belt and Road Initiative (BRI) has intensified economic engagement, serving as the fulcrum of the relationship. The China-Pakistan Economic Corridor (CPEC), the flagship BRI project, has exemplified this leadership-driven deepening of the partnership and reinforced Pakistan's economic dependence on China. By the end of 2022, the CPEC had facilitated over US\$25 billion in direct investment.⁷

Despite localised protests and concerns about returns, Pakistan continues to attract substantial Chinese investment. During his visit to China for the Shanghai Cooperation Organization summit and the 93rd military parade in August–September 2025, Pakistan Prime Minister Shehbaz Sharif secured US\$8.5 billion in new investment agreements.

China also leverages its ties with Pakistan to create a strategic buffer on the Indian subcontinent, safeguard energy routes through which roughly 80 percent of its imports transit the Indian Ocean, and mitigate risks from Kashmir-related spillovers that could threaten its western frontier, while securing key nodes like the Gwadar Port.⁸

Military and Technological Nexus

Between 2020 and 2024, approximately 63 percent of China's arms exports were directed to Pakistan, deepening Islamabad's reliance on Beijing for military procurement. In the same period, China supplied 81 percent of Pakistan's arms imports, up from 74 percent in 2015–2019, including combat aircraft, frigates, fighter jets, naval vessels, drones, and air-defence systems.⁹ The developments in the India-Pakistan conflict in May 2025 illustrate the operational depth of the China–Pakistan strategic nexus and its central orientation towards India, especially the integration of Pakistani and Chinese military capabilities, including Chinese-origin fighter aircraft, PL-15 missiles, and unmanned aerial systems.¹⁰

Yet, the partnership extends beyond conventional arms to advanced systems and networked warfare. The establishment of the China-backed Centre for Artificial Intelligence and Computing will allow the Pakistan Air Force to link sensors directly to weapons systems, supporting the creation of a smart kill-chain and enabling faster deployment of air-launched platforms, including the Ra'ad cruise missile.¹¹ The nexus also encompasses cyber and informational domains, including intelligence-sharing, targeted disinformation, and the strategic use of Chinese technologies to shape perceptions and influence regional narratives, particularly after Operation Sindoor. These developments collectively indicate a comprehensive, multi-domain strategy to strengthen the bilateral partnership and further reinforce the existing two-front threat to India.

Strategic Tolerance

The CPEC has fallen short of the benefits projected by both Chinese and Pakistani authorities. A decade since its launch, it has yet to deliver on its original ambitions, constrained by Pakistan's internal governance challenges. While energy projects have helped ease power shortages and created jobs, progress on core infrastructure such as Gwadar Port and the ML-1 railway has been repeatedly delayed due to political disputes and administrative inefficiencies.¹² Security has also been a persistent constraint for Chinese stakeholders and a primary cause of delays. In Balochistan alone, 14 attacks on Chinese-linked projects were recorded in 2024 that prompted tighter security measures and restricted movement at multiple sites.¹³

There have also been costs in human lives. In 2024, Chinese nationals working on CPEC projects were targeted in two attacks, prompting Chinese Ambassador to Pakistan, Jiang Ziadong, to urge Islamabad to act against “all anti-China terrorist groups,” stressing that “security is the biggest concern” and that “without a safe and sound environment, nothing can be achieved.”¹⁴ While the casualty figures are uncertain, over 20 Chinese nationals have reportedly died since the projects began. These incidents, along with domestic protests, have been largely downplayed, and details on investment terms, project scope, and Pakistan's financial obligations remain opaque, with both governments tightly controlling the narrative and portraying CPEC as wholly mutually beneficial.¹⁵

China has exercised deliberate tolerance towards Pakistan's internal vulnerabilities to safeguard broader strategic objectives. India's centrality in Beijing's regional calculus ensures that economic and security initiatives in Pakistan, most notably CPEC, receive sustained support despite operational challenges, including targeted attacks on Chinese personnel and broader domestic instability. These incidents are frequently framed as part of Pakistan's victimisation by terrorism, reinforcing the narrative of an "all-weather friendship" and enabling the Pakistani establishment to avoid direct accountability for cross-border terror threats.¹⁶

Additionally, Islamabad's renewed engagement with Washington, including a memorandum of understanding on critical minerals, introduces potential sources of friction. Yet from Beijing's perspective, such developments are secondary to Pakistan's continued strategic alignment with China.

Conclusion

The China–Pakistan relationship is marked by pronounced strategic asymmetry. Pakistan depends on China economically, militarily, and diplomatically, while China's engagement is

driven primarily by its own strategic interests, particularly in relation to India. The narrative of an 'all-weather friendship' serves as both a political and symbolic instrument, obscuring structural inequalities and enabling Chinese tolerance of Pakistan's internal vulnerabilities. The CPEC, extensive arms transfers, and growing technological integration reflect a multi-domain partnership but one that also simultaneously deepens Pakistan's dependency on China.

The 2025 India–Pakistan conflict highlighted the limits of reciprocity. Despite decades of cultivation, the relationship remains fundamentally utilitarian rather than balanced, with India continually shaping China's strategic calculus. While Pakistan may serve as an asset in certain contexts, its unresolved challenges, fluctuating engagement with the US, and continued association with terrorism also generate potential liabilities for Beijing. Nevertheless, China appears willing to absorb these risks and sustain its support for a state implicated in instability and militant proxies when doing so advances its broader objective of constraining India.

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Understanding the Upswing in U.S.-Pakistan Relations

Husain Haqqani

Frequent meetings between Pakistan's chief of army staff Field Marshal Asim Munir and United States (US) President Donald Trump have generated a narrative that US-Pakistan relations will return to an earlier golden era. Yet the relationship between the two has always been a tale of exaggerated expectations, unfulfilled promises from both sides, and grievous misunderstandings. It is unlikely that things will be different this time around.

Since Pakistan's founding in 1947, its leaders have sought external economic and military assistance as a means of maintaining national security and mitigating the country's weak finances. The US, as a superpower with plenty of disposable cash, was an early target of Pakistani policymakers' messaging that, for the right price, they could be its partner in South Asia. Pakistan's view of itself as a 'warrior nation' led to the belief that its military was a coveted potential partner for other countries.

The current Pakistani leaders, civilian as well as military, are selling President Trump the same argument that the country's founding father, Muhammad Ali Jinnah, made to US diplomats soon after Pakistan's founding: The US needs Pakistan because of Pakistan's location and large military.¹ After each transactional embrace of the preferred geopolitical plans of various US administrations, Pakistan has found that the partnership was tactical on the US's part and never resulted in a strategic convergence of interests.

It is true that, over the years, Pakistan has repeatedly secured US military equipment, some investment, and considerable economic assistance, as well as support at multilateral financial institutions. However, Pakistan's desire for US support in securing advantage against India has always remained unfulfilled. The US has never stepped up to 'resolve' the dispute over Jammu and Kashmir to Pakistan's advantage or satisfaction either.

Having dealt with US administrations for almost eight decades, Pakistan has developed a playbook that works with most of them. This includes strong personal relations and public praise of American leaders and generals. President Trump is especially vulnerable to this playbook, which is why US-Pakistan relations seem to be on the upswing at present. Given the rollercoaster history of the relationship, however, it will likely not sustain its current high.

The US's military withdrawal from Afghanistan in August 2021 resulted in acrimony over Pakistan's role in the Taliban's return to power. Keen to move beyond then President Joe Biden administration's policy of benign neglect of Pakistan, Islamabad worked hard to woo the incoming second Trump administration. In addition to lobbying Trump's inner circle, Pakistan has also enhanced engagement with the US military and intelligence establishments to get back into America's good books.

Gaming the US president's personality, Pakistan offered Trump an early win after his second inauguration. In March 2025, Pakistani authorities arrested and extradited Mohammad Sharifullah, charged in the US for his role in the 26 August 2021 Kabul airport bombing that killed 13 US service members and more than 160 civilians.² This led to Trump naming and thanking Pakistan in his State of the Union address.³

Similarly, knowing well that Trump is fixated on countering China by ensuring that the US has exclusive access to critical minerals and energy resources, Islamabad has offered support. In early April 2025, it hosted a Minerals Investment

Forum attended by an interagency US delegation. Discussions have focused on advancing US interests in Pakistan's mining and energy sectors and on jointly exploring critical minerals.⁴ It helped that some of those offered mining deals in Pakistan are close friends or business allies of the Trump family.⁵

Although initially, on 1 April 2025, Pakistan was slammed with a 39 percent tariff rate, Trump's team lowered it to 19 percent after Pakistan committed to importing more US products, including crude oil, and to opening investment opportunities for US firms in energy, mining, and information technology.⁶ Pakistan's public praise of the US President's role in the May 2025 India-Pakistan ceasefire, and its nomination of Trump for the Nobel Prize, resulted in invitations to the White House for Field Marshal Munir and Prime Minister Shahbaz Sharif.

Currently, Pakistan is positioning itself as a partner in President Trump's focus on the Middle East. It is an intermediary for the US with Iran, as it was when the US first sought to establish relations with China in 1970. As one of the top contributors to United Nations-mandated peacekeeping missions, Pakistan is one of eight Muslim-majority countries that have offered to contribute to the proposed International Stabilization Force for Gaza. All of this has resulted in Pakistan gaining a seat at Trump's high table and words of praise from the US President for Pakistan's current leaders.⁷

The American military continues to see Pakistan as a source of manpower for its area of command. One week before the first White House meeting

between President Trump and Field Marshal Munir on 18 June 2025, at a House Armed Services Committee hearing, then US Central Command (CENTCOM) Commander Gen. Michael Kurilla praised Pakistan's role in capturing Mohammad Sharifullah and in countering the terrorist group Islamic State–Khorasan, calling it a “phenomenal partner.”⁸ A month later, Kurilla received the Nishan-e-Imtiaz (Military), one of Pakistan's highest military honours, becoming one of the few senior US officers to be so recognised.⁹

Pakistan has yet to benefit from the current round of bonhomie with the US in terms of investment or expanded trade. That is because, unlike with China's strategic public sector investments in Pakistan, private sector investors need the country to implement economic reforms before they consider investing. There have been, however, gains for Pakistan on the security side (albeit limited). All three Pakistani service chiefs visited the US in 2025, reflecting the Pakistani desire to return to a broader security cooperation beyond just counterterrorism.

It is true that no new US military equipment has yet been approved for sale to Pakistan, while the Trump administration has globally discontinued the US's past practice of providing foreign military funding (FMF) loans. However, in October 2025, Pakistan was included in a contract—along with North Atlantic Treaty Organization (NATO) countries and some Middle Eastern countries—under which US defence contractor Raytheon will provide sustainment and spare parts for its Advanced Medium Range Air-to-Air Missiles (AMRAAM) to them.¹⁰

Again, in December 2025, the US approved a US\$686-million technical support and upgrade package for Pakistan's F-16 fighter jet fleet. This is designed to modernise the Block-52 and Mid-Life Update (MLU) F-16s, ensuring they remain operational until at least 2040. Still, this is routine for countries that fly American military aircraft and does not add to Pakistan's existing military capabilities. For additional firepower, Pakistan still continues to look to China.

For decades, the US has sought to change Pakistan's strategic focus from competing with India and seeking more influence in Afghanistan, to enhancing internal stability and economic development. But its military and economic support did not change Pakistan's priorities.

Since the time Pakistan was formed, four American presidents—Dwight D. Eisenhower, John F. Kennedy, Lyndon B. Johnson, and Donald J. Trump (in his first term)—have asked the question: what do we get from aiding Pakistan? Five—Jimmy Carter, George H. W. Bush, Bill Clinton, George W. Bush, and Barack Obama—have wondered aloud whether Pakistan's leaders could be trusted to keep their word. For example, in the aftermath of the 9/11 attacks, Pakistani leader Musharraf pledged to assist the United States, but Bush noted in his book *Decision Points* that “over time, it became clear that Musharraf either would not or could not fulfil all of his promises.”¹¹ Obama, in proceeding with the raid to kill Osama Bin Laden, chose not to consult the Pakistani government because he claimed it was an “open secret” that elements of the Pakistani military and intelligence had ties to the Taliban, and potentially, al-Qaeda.¹²

Even so, geopolitical considerations have led the US to enlist Pakistan as an ally on three occasions: during the Cold War (1954–1972), the war against the Soviets in Afghanistan (1979–1989), and the war against terrorism (2001–2021). In each instance, the US reason for pursuing its alliance with Pakistan differed widely from Pakistan’s motives in partnering with the US. For instance, after the Soviet invasion of Afghanistan in 1979, US National Security Adviser, Zbigniew Brzezinski, saw an opportunity to avenge the Vietnam War and bleed the Soviet Red army with the help of militant Islamist radicals. But for Pakistan, American equipment and training for jihad in Afghanistan were to become a launching pad for asymmetric warfare that would increase its regional influence against India.

This time, too, the US-Pakistan partnership is not an alliance based on shared global goals and interests. It remains a transactional arrangement between two partners with different enemies and different worldviews. Pakistani leaders are once again assuring an American President that they share his global security concerns, hoping to win his support for Pakistan’s regional aims. In the past, Pakistan was disappointed because the US did not share its view of India. This time, it has to also contend with the unpredictability and fickleness of an unconventional American President.

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Preferences and Paradoxes in EU-Pakistan Ties

Shairee Malhotra

Bilateral relations between the European Union (EU) and Pakistan are currently governed by the institutional framework of the 2019 EU-Pakistan Strategic Engagement Plan (SEP).¹ Despite the SEP's comprehensive ambit—covering governance, migration, sustainability, education, technology, security, and economics—EU-Pakistan engagement has largely centred around the domains of trade and aid.

In theory, the EU has conditioned its external action and trade policy towards Pakistan on democratisation and human rights, resembling a carrot-and-stick approach and a donor-recipient relationship. Official data from the European External Action Service (EEAS) in 2019 shows that, since 1991, the EU has provided €1.3 billion in development assistance to Pakistan,² and together with its member states, it provides around €700 million annually.³ Moreover, between 1997

and 2018, the EU deployed multiple Election Observation Missions (EOMs) to Pakistan, in line with its efforts to strengthen democracy in Pakistan.⁴

GSP+ at the Centre

At the heart of EU-Pakistan trade relations remains the GSP+ (Generalised Scheme of Preferences) status, an incentive arrangement aimed at supporting good governance and sustainable development in developing countries,⁵ which the EU granted Pakistan in January 2014. At preferential tariffs, the scheme has boosted Pakistan's exports to the EU market by 108 percent from 2014-2022, making Pakistan the largest beneficiary of the EU's GSP+ globally.⁶ The EU has emerged as Pakistan's top export destination, accounting for 16 percent of Pakistan's trade in 2019,⁷ while annual bilateral trade surged from €8.3 billion in 2013 to €14.85 billion in 2022.⁸

However, regardless of these benefits and the EU's total imports exceeding US\$3 trillion annually, Pakistan accounts for a mere 0.2 percent of total EU trade and is 48th among the EU's trading partners.⁹ Meanwhile, the EU is Pakistan's second-largest trading partner after China, although over 75 percent of Pakistan's exports to the EU are concentrated in the textile, clothing, and leather sectors.¹⁰ Indeed, Pakistan continues to have a less diversified export basket owing to challenges related to compliance with EU standards, non-tariff barriers, and an over-dependence on labour-intensive products—driven by limited innovation (Pakistan ranked 88th in the 2023 Global Innovation Index¹¹), infrastructure constraints, and weak technological capacity. On the other hand, Pakistan imports high-value-added products from the EU, including pharmaceuticals, electronics, and machinery. While the EU is Pakistan's largest foreign investor, the country needs greater Foreign Direct Investment (FDI) to enhance exports in value-added sectors such as information technology (IT), pharmaceuticals, and automobiles.

Meanwhile, Pakistan's GSP+ status—which is conditional on compliance with and implementation of the 27 core United Nations conventions related to good governance, environmental protection, and human rights—^{a,12} is facing increasing scrutiny within the EU. Over the years, the European Parliament¹³ and organisations such as Human Rights without Frontiers¹⁴ have called for the withdrawal of Pakistan's GSP+ status, citing the country's human rights record, including blasphemy laws, honour killings, the oppression of minorities, lack of media and judicial independence, and

other unfulfilled commitments to international instruments. In January 2025, the EU Special Representative (EUSR) for Human Rights, Ambassador Olof Skoog, warned Islamabad “not to take its GSP+ status for granted.”¹⁵ Yet, despite monitoring missions highlighting limited progress, and the post-Brexit loss of Islamabad's strongest supporter in Brussels,¹⁶ Pakistan has continued to benefit from the EU's GSP+. This reflects broader paradoxes in EU policy towards Pakistan.

Paradoxes in the EU's Pakistan Policy

EU-Pakistan relations have also included a security component, with the EU engaging Pakistan on counterterrorism efforts, capacity-building initiatives for law enforcement agencies, annual military dialogues, and discussions on non-proliferation and disarmament.¹⁷ Yet, despite Pakistan's sustained use of state-sponsored cross-border terrorism, the EU has maintained a neutral stance instead of holding the country accountable.

With respect to Pakistan's GSP+ status, the EU has not conditioned its extension on Pakistan abandoning terrorism as an instrument of state policy, besides pressuring the country towards genuine reforms that facilitate meaningful improvements for its citizens. As a trading partner of Pakistan, the EU holds substantial economic leverage to enact positive change, but it has instead punched below its weight. Rather than relying on futile attempts to use trade policy to democratise Pakistan's military dictatorship, the EU could more effectively deploy its soft power instruments while also setting a precedent for other GSP+ beneficiary countries.¹⁸ Pakistan's next GSP+ renewal is due in 2027. A passive and less

a Examples include the International Covenant on Civil and Political Rights and the International Convention on the Elimination of All Forms of Racial Discrimination.

stringent approach risks undermining the EU's values and credibility, while further weakening regional peace and stability in South Asia.

At the same time, Pakistan's persistent internal dysfunctions have not undercut EU development assistance. The EU has provided financial aid for disaster preparedness and supported responses to climate shocks impacting Pakistan, as well as supported the millions of Afghan nationals residing in the country.¹⁹ In July 2025, the two sides signed a €20-million grant agreement under the EU's 2021-2027 Multiannual Indicative Programme to foster inclusive and sustainable governance in Pakistan.²⁰

The EU and Pakistan are also engaging through the EU's Global Gateway initiative in developing Technical and Vocational Education and Training (TVET) Centres, renewable energy projects, and recovery efforts in Pakistan's flood-impacted areas such as Khyber Pakhtunkhwa.²¹ In addition, technical and financial collaborations to modernise and decarbonise Pakistani industrial production processes, and harness cooperation in green and digital sectors, are expanding the scope of bilateral ties. Trade, migration, connectivity, energy security, digitalisation, and climate action remain promising areas for deeper EU-Pakistan cooperation, but such engagement should be linked to tangible changes within Pakistan.

Regular bilateral dialogues have underpinned EU-Pakistan ties. While the first High-Level EU-Pakistan Business Forum scheduled for mid-May 2025 was postponed due to India-Pakistan tensions,²² the 10th EU-Pakistan Political Dialogue was held in Brussels in July 2025,²³ and

the 7th EU-Pakistan Strategic Dialogue a few months later in November.²⁴ A Comprehensive Dialogue on Migration and Mobility—focused on irregular migration and legal pathways under the EU-Pakistan Talent Partnership—is also being planned.²⁵ Even with the issues plaguing the EU-Pakistan partnership, these exchanges are carrying forward the momentum in bilateral ties.

An Evolving Geopolitical Chessboard

Notwithstanding its importance as an economic actor, the EU has exercised limited strategic influence in Pakistan compared to the United States (US) and China, particularly in the latter's quest to achieve parity with historical rival, India.

Despite occupying a relatively peripheral position in the EU's Asia policy, Pakistan attracted European attention due to its strategic location, proximity to Afghanistan, and former utility as a frontline state in the War on Terror. However, as Pakistan's strategic value diminishes and as Europe navigates mounting geopolitical challenges—including the ongoing Russia-Ukraine war and increasingly strained ties with its top trading partners, the US and China—its relations with India are undergoing consolidation. EU-India ties have, in recent years, expanded across various security, trade, and technology domains.²⁶

While Kashmir is no longer a major irritant in EU-India ties,²⁷ the escalation of India-Pakistan tensions following the terrorist attack in Kashmir's Pahalgam in April 2025 created challenges for European diplomacy. New Delhi criticised the EU for whitewashing Pakistani terrorism and its double standards on conflicts. Going forward, the

EU may be faced with sharper strategic choices that require clearer positioning on Pakistan against the backdrop of deepening EU-India ties and broader efforts to de-risk relations from the US and China. In this context, Pakistan's utility—amidst continued dependence on IMF bailouts²⁸—appears limited. At the same time, Europe's increasing investment in its own security and defence²⁹ may result in a lack of available resources towards foreign assistance programmes in Pakistan and elsewhere.

Meanwhile, Europe—traditionally viewed as a bastion of liberal values and progress—has also faced shifting perceptions within Pakistan. Rising populism, Islamophobia, and perceived selectivity in Europe's approach to global issues have somewhat weakened the continent's image in Pakistan.³⁰

Amidst shifting global alignments, the EU would benefit from formulating a more coherent and timely policy towards Pakistan.

The Paradoxical Relationship: Three Motives for Russia's Courtship of Pakistan

Aleksei Zakharov

Over the past several years, the main leitmotif of Moscow–Islamabad ties has been as follows: multiple political and diplomatic engagements, primarily at multilateral gatherings; a series of signed Memorandums of Understanding (MoUs); and ambitious plans and various expectations of a breakthrough in a number of projects in energy, transport, and industrial cooperation. However, since progress is constrained by various structural factors, the reality of the bilateral relationship is more nuanced than official statements suggest.

Historically, Pakistan has never been a Russian ally, nor even a close friend. Still, there have been periods when the two countries have

joined forces as a result of Moscow's tactical geopolitical outreach and technological assistance.^a Economically, Pakistan has never been a lucrative market for Russian goods or a critical supplier of essential items for Russian industries. Politically, the somewhat tepid bilateral ties are evidenced by the fact that the Russian (and previously Soviet) leaders have never visited Islamabad, preferring either to host their Pakistani counterparts in Moscow or meet them in neutral territory.

Therefore, when reflecting on the state of Russia-Pakistan relations, the question inevitably arises as to why Moscow is still willing to invest effort in a partnership with such an ambiguous outlook.

^a For example, the Soviet Union provided economic and technological support to Pakistan in the 1960s, engaging in projects across energy, agriculture and communications. Despite geopolitical divergences, Moscow continued to offer technological expertise in the 1970s and 1980s, as evidenced by the completion of a large steel plant in Karachi.

Geostrategic Imperatives with Unclear Prospects

One explanation why the promotion of bilateral ties continuously resonates in Moscow is that Pakistan fits into Russia's broader geostrategic vision and regional outlook. As part of its 'Greater Eurasian Partnership' (GEP), Moscow pursues continental integration by creating linkages between a number of multilateral formats and initiatives. While announcing the idea for the first time in June 2016, President Vladimir Putin mentioned several regional partners, including "the Eurasian Economic Union (EAEU) and Commonwealth of Independent States (CIS) members, as well as such countries as China, India, Pakistan, and Iran."¹

The GEP concept has seen moderate progress since its appearance and Pakistan has featured in Russia's aspirations to integrate the Eurasian space. As Pakistan is part of China's flagship Belt and Road Initiative (BRI), which is endorsed by Moscow as compatible with its vision for regional integration, Russia and Pakistan are largely aligned on the regional developments. Pakistan is also a member of the Shanghai Cooperation Organisation (SCO) and, in Russia's eyes, is a crucial player in Afghan affairs. For this reason, Moscow has teamed up with Islamabad in various Afghan-related initiatives, ranging from the extended 'Troika'—comprising special representatives of Russia, the United States, China, and Pakistan and operational from March 2019 to March 2022—to the Moscow format,^b and a so-called 'Afghan Quad' comprising China, Iran, Pakistan, and Russia.²

Since 2016, Pakistan has been eager to sign a Free Trade Agreement (FTA) with the EAEU. Although Moscow backed the proposal in 2017 and the relevant ministries on both sides were tasked to draw up recommendations,³ it was technically impossible to agree on a deal for a long time due to Pakistan's non-recognition of one of the EAEU members, Armenia. The signing of a joint communiqué⁴ on the establishment of diplomatic relations between Islamabad and Yerevan at the SCO summit in Tianjin in August 2025 paved the way for Pakistan-EAEU negotiations on the FTA. However, talks on the issue are still in the initial stage, with the two sides having only launched the feasibility study group at the time of writing.⁵

In addition to their engagement at multilateral fora, Russia and Pakistan have cultivated bilateral mechanisms to spearhead regular discussions across a wide range of domains.

An Upgrade of Bilateral Dialogue

After entering into a confrontation mode with the West, Russia has begun to value its relations with developing countries, even coining the term 'World Majority'⁶ to describe non-Western countries that are either friendly or neutral towards Russia. Moscow has been seeking to secure their support, or at least positive neutrality, on issues that are critical to its interests within international organisations and multilateral groupings. The position of these countries on the war in Ukraine has been a litmus test for identifying the level of their relationship with Russia. From this perspective, Pakistan has seemingly responded to Moscow's expectations, having abstained

b A consultation mechanism that brings together senior officials from Russia, India, Iran, Kazakhstan, Kyrgyzstan, China, Pakistan, Tajikistan, and Uzbekistan,

from voting on the United Nations General Assembly resolutions condemning Russia's actions in Ukraine. Moscow has also played down the reports of Pakistani supplies of ammunition to Kyiv.⁷ The existence of such supplies is hardly in doubt, given that images of Pakistani-origin rounds⁸ and drones⁹ have been disseminated on social media.

Moscow's flexibility on this issue is presumably driven by the following factors: the absence of evidence that the armaments were shipped directly by Islamabad; the one-off nature of these shipments, which had no considerable impact on the situation on the battlefield; and the belief that these were delivered under compulsion from Pakistan's Western partners, such as the United States and the United Kingdom. In any case, the appearance of Pakistani arms in Ukraine has not affected the Russia–Pakistan relationship. On the contrary, political dialogue between Russia and Pakistan has intensified, with regular meetings taking place at various levels, including intergovernmental, diplomatic, military, and parliamentary. Many of the previously established mechanisms, such as the working group on counter-terrorism and international security, and the consultative group on strategic stability, are now convening more regularly. Furthermore, the militaries of both nations have maintained close contact through regular bilateral and multilateral exercises and Joint Military Consultative Committee (JMCC) sessions, which have taken place without interruption since 2023.

The Niches of Economic Engagement

Another rationale behind Moscow's outreach to Pakistan is related to its economic interests. Being banned from the Western markets, Russia has oriented its exports of commodities to the south and east. While Moscow has consistently supplied large amounts of agricultural products to Pakistan, promoting the export of other commodities, such as crude oil, has proven more problematic. Despite Russia delivering two batches of crude oil totalling 100,000 tonnes in June 2023, Pakistan has not pursued the Russian proposal to enter into commercial contracts, resulting in the absence of further crude shipments. Various factors, including disagreement on discounts, high transport costs, and the incompatibility of Pakistani refineries with Russian heavy crude, have prevented Pakistan from stepping up oil imports from Russia.¹⁰

Pakistan is viewed as a potential transit hub that can become a conduit for increased Russian supplies to regional markets. Judging by the recent discussions between officials of the two countries, there are two particular transport corridors that could provide Moscow with an alternate access to the Indian Ocean. The first is the railway corridor from Minsk to Karachi, which passes through territories of Belarus, Russia, Kazakhstan, Uzbekistan, Afghanistan, and Pakistan, and has been developed by the participant countries since November 2023.¹¹ The section from Termez in Uzbekistan to Peshawar in Pakistan, via Afghan territory, however, is still the missing link. The second project is the Torghundi–Herat–Kandahar–

Spin Boldak railroad, which is actively promoted by Kazakhstan and Turkmenistan and is seen by Russia as a potential extension of the eastern branch of the International North-South Transport Corridor (INSTC).¹² Both these projects, when completed, would provide Moscow with access to the Indian Ocean through the Pakistani port of Karachi and reduce its dependence on Iranian transport infrastructure.

Given that projects on Afghan territory are prone to various security and technical issues, the viability of both projects is questionable, as implementation may take years. Additionally, there are no signs that the imbalanced trade structure between Russia and Pakistan, heavily skewed in Russia’s favour and dominated by Russian wheat supplies, will change in the foreseeable future (see Table 1). Improved transport connectivity between Russia and Pakistan, also does not guarantee a considerable upgrade in trade activity, given the existence of other hurdles, such as payment issues, which have prompted the two states to resort to a barter trade system.¹³

Notably, rather than viewing the new corridors through the lens of its economic cooperation with Pakistan, the Russian government considers these corridors a gateway for exports to India, Southeast Asia, and the Persian Gulf. From this perspective, Karachi port is expected to serve as a trade hub, offering Russia an alternative to Bandar Abbas, which is currently the focal point of the INSTC. However, if and when these corridors become operational and prove to be more viable than sea lines, the assumption that India will be keen to receive Russian commodities from a Pakistani port seems fundamentally flawed.

Looking Ahead

Moscow’s efforts to cultivate closer ties with Pakistan arguably serve three main objectives. First, Russia is seeking to draw Pakistan into its regional initiatives, recognising Islamabad as an important partner in Eurasia. Second, as part of its broader engagement with the Global South, Moscow requires Pakistan’s loyalty and collaboration within

Table 1. Pakistan’s Exports to and Imports from Russia (2020–2024, in US\$ Million)

Year	2020	2021	2022	2023	2024
Exports	144	176	77	89	67
Imports	613	539	590	892	632
Total	757	715	667	981	699

Source: Trade Development Authority of Pakistan¹⁴

international organisations. Third, having re-routed its economic supplies southwards, Russia has been exploring new markets and transit opportunities. These motivations appear poised to drive the Russia–Pakistan relationship forward.

That said, Moscow and Islamabad face several challenges in deepening their cooperation. Pakistan’s struggling economy means Russia cannot expect significant returns from large-scale bilateral projects. Being reliant on external support from the donors like International Monetary Fund (IMF), Pakistan is compelled to tread carefully in its engagement with Russia. While Moscow is capable of assisting Pakistan with

certain technological solutions, exemplified by the upgrade of the Karachi steel plant,¹⁵ it is not in a position to invest massively in Pakistani transport and energy infrastructure.

Additionally, India’s partnership with Russia will continue to be a pivotal factor for Russia–Pakistan ties. The extent to which Moscow is willing to commit to its relationship with Pakistan, which offers more hope than immediate benefit, will largely depend on the trajectory of the India–Russia strategic dialogue. This well-known and enduring limitation will evidently prevent the Moscow–Islamabad connection from shifting to a strategic level.

Pakistan's South Asia Gambit Post-Operation Sindoor

Shivam Shekhawat

In the year since Operation Sindoor which marked a new normal in the relationship between India and Pakistan, Islamabad has increased its relevance in global diplomacy. This is reflected in its mediation role in the Iran war and its growing cooperation with the United States (US). At the same time, domestically, Pakistan is seeing the concentration of power under the military and therefore the blurring of lines between a civilian government and a military-led hybrid regime.¹ While Islamabad's policy towards South Asia is predominately defined by its dyad with India,² and is thus security-centric, it has attempted to take advantage of the flux in the region in the last few years to increase its outreach and leverage the changed political context.

China's growing presence in South Asia and Pakistan's 'all-weather friendship' with Beijing adds another layer of complexity. Beijing offers military, political, and diplomatic support to

Islamabad and coopts the latter in its efforts towards forming new partnerships in the region amidst its contest with India.³ Pakistan perceives this competition as a way of increasing its own leverage. While it has attempted to pivot more towards West and Central Asia in recent years, similar to its historical posture, the ongoing flux in South Asia and Beijing's assertiveness has given it more space to manoeuvre.

Challenging India's Presence in the Region

As Pakistan came into being in 1947, its foreign policy approach was seen as opting out of South Asia and focusing instead on Southwest Asia, stressing on its common Muslim identity with the countries of West Asia and creating a distinct 'Pakistani identity' to differentiate it from India.⁴ It emphasised building a security system against India through the Islamic countries of Southwest Asia in keeping with its religious identity. The

creation of Bangladesh in 1971 also reduced Pakistan's involvement in the region. Thus, Pakistan's troubled historical ties with India as well as its policy choices post-independence, particularly regarding the use of terror as a state policy and pegging its existence in a perennial state of crisis with India has rendered its ability to forge any concrete regional policy moot. On the other hand, over the last few decades, India has expanded its political and economic partnerships with the regional countries, moving beyond the constraints imposed by its impasse with Pakistan and forging alternate groupings and mechanisms in order to attain regional and sub-regional connectivity.

In the 1950s, Pakistan tried expanding its relations with the region by stoking the smaller countries' anxieties about India's size and possible domination, thus projecting India as a mutual threat. It outlined its policy as a push against India's efforts to 'contain' Pakistan.⁵ For South Asian countries, engagement with Pakistan allowed them to project autonomy vis-à-vis India's apparent influence and reinforce their agency while projecting a nationalist image.

The regional countries, excluding India, are Nepal, Maldives, Bhutan, Sri Lanka, Bhutan, and Bangladesh. Pakistan signed a Free Trade Agreement (FTA) with Sri Lanka in 2005, while it formed a Joint Economic Commission with Nepal in 1983 and a Joint Business Council in 1994. It signed MoUs with the Maldives in 2013, 2015, and 2017. Islamabad's connectivity with the countries is also limited, with connections only to Colombo and no link to the other South Asian capitals. It shares no borders with the countries in the western part of South Asia except India, directly

impacting Pakistan's ties with these countries in the event of a tense climate. The National Security Policy released in 2022 during the Imran Khan regime also emphasised furthering its ties with the region to negate the critical perceptions about Pakistan. It also sought to reiterate the civilisational linkages between the countries and expand cooperation in tourism, religious studies, and cultural cooperation. But it has made no significant gains in the region.

From Pakistan's perspective, diplomatic and political engagement with South Asia, excluding India, yields limited returns compared to its investments in the Middle East and, more recently, in Central Asia. The Middle East remains a cornerstone of Pakistan's foreign policy due to economic ties and labour market opportunities, while Central Asia offers new avenues for trade and connectivity. This strategic shift reflects Pakistan's prioritisation of regions where it perceives heftier economic and political dividends, even as its links to South Asia continue to erode under the weight of unresolved conflicts with India.

Since the boycott of the SAARC (South Asian Association for Regional Cooperation) summit in 2016 by India and other member countries due to Islamabad's unceasing policy of fomenting terrorism directed at India, Pakistan has been veritably alienated from any form of institutional regional cooperation. This was in response to several terror attacks targeting Indian security agencies since 2016, with two counter-responses from New Delhi: the Uri and Balakot strikes. The South Asian countries' support was contingent on their own domestic politics, their ties with India, and their stance on the problem of terrorism.

When India decided to boycott the SAARC summit in 2016, Bangladesh, Bhutan and Afghanistan supported India's stance, while Nepal, Maldives and Sri Lanka urged for its reconvening at a later date, although they later withdrew from the summit. This stated isolation, as argued by certain analysts, gives Islamabad room to etch future bilateral engagements with the countries.⁶

In October 2016, a delegation of parliamentarians from Pakistan proposed the idea of a Greater South Asia, which would include Iran, Central Asia, and China, in addition to the countries in South Asia, as an attempt to carve out an alternative platform for itself.⁷ By including the remaining SAARC members in such a coalition, Pakistan would consequently counter the perception of isolation and bolster its standing in the region. Its emphasis at that time was on sub-regional initiatives as a means of moving out of the SAARC deadlock, which, according to Islamabad, was a deliberate misuse of bilateral issues to undermine regional cohesion. These policy recommendations were thus linked to a possible strategic encirclement of New Delhi. Ten years later, none of these iterations has materialised, with Islamabad banking on its limited bilateral engagements with other neighbours as New Delhi relies more on BIMSTEC (Bay of Bengal Initiative for Multi-Sectoral Technical and Economic Cooperation). Although the initiative was launched in 1997, it received a renewed push after SAARC became obsolete in the post-2016 milieu. Other sub-regional initiatives, such as BBIN (Bangladesh, Bhutan, India, and Nepal) and the energy cooperation agreement between Nepal and Bangladesh, are all intended to bypass the obstruction imposed by Pakistan's presence and intransigence on certain issues.

The Post-Operation Sindoor Calculus

In May 2025, when India and Pakistan engaged in a stand-off—the worst the two sides had seen in the last few years—the regional countries, while collectively condemning the terrorist attack on civilians in April 2025, criticised India's consequent military strike and called for a de-escalation. In the immediate aftermath of the attacks, the Pakistani government, similar to the Indian side, sent delegations to world capitals to make a case for its actions during the conflict. While countries called out Pakistan for supporting terrorism in the region, their response was more in line with the region's non-aligned posture, similar to previous responses to instances of conflict between the two sides. While they have been regarded as 'swing states', open to recalibrating their foreign policy choices in the aftershocks of the crisis, an India-Pakistan conflict is seen as impacting their calibrated ambiguity.⁸ But their responses are also a factor of their historical positions of neutrality.⁹

In the month following Operation Sindoor, China gathered the foreign secretaries of Pakistan and Bangladesh in Kunming, China for the first trilateral meeting between the three countries. The timing of the meeting was crucial and the discussion focused on furthering cooperation and strengthening ties between China and the South Asian countries.¹⁰ The meeting also followed an informal China-Pakistan-Afghanistan trilateral on 15 May, to pave the way for the sixth edition of the Foreign Ministers' Dialogue between the three countries, held in August 2025 in Kabul. The meeting in Kunming was portrayed as the first iteration of a trilateral mechanism, an alternative regional bloc, sans India: an idea floated by Pakistan's Foreign Minister, Ishaq Dar,


again in December 2025. For Pakistan and China, the change in governments in both Afghanistan and Bangladesh created more space for them to find areas of cooperation with the new regimes in order to complicate New Delhi's position in the region.¹¹

Beijing's attempts to convene these minilaterals are perceived as a deliberate policy of sidelining India's role in the region.¹² While these attempts have seen ups and downs over the years, for Pakistan, Beijing's willingness to challenge India's influence in South Asia as other countries continue to cooperate with New Delhi is seen as advantageous. It was in favour of Beijing getting full-time membership to SAARC, which was discussed during the 2014 summit but which fell through. In the absence of SAARC, Pakistan sees benefits in having Beijing into the South Asian equation.

In the months that followed, it extended humanitarian assistance to Sri Lanka for Cyclone Ditwah in December 2025, which was followed by a ministerial visit.¹³ The Maldives also hosted a high-level military delegation led by the chairman of Pakistan's Joint Chiefs of Staff Committee in October 2025. Pakistan is at present also in talks with Bangladesh for the sale of its JF-17 Thunder Block 3 combat aircraft, which it jointly develops with China. This development follows the thaw in ties between Islamabad and Dhaka since the

overthrow of the Sheikh Hasina-led Awami League government in July 2024. Under the new BNP-led government as well, engagement between the two countries has seen an uptick with initiation of mid-career civil services training in May 2026.

For Pakistan, the preoccupation with India in the security front relegated its relationship with the other countries to the back burner. The smaller South Asian countries were seen as having no discernible impact on its security calculations; but Islamabad's strong ties with China and the contestation between India and China in the region, with the strong US-India partnership also brought Islamabad in the equation.¹⁴

While working in tandem with China in furthering its relationship with the regional countries can accrue benefits to Islamabad, the possibility of a fundamental restructuring in how the countries view their relationship with Pakistan is limited. The constraints imposed on Pakistan by its internal developments, its military-led foreign policy, as well as the 'open war' with Afghanistan which has been ongoing for the last few months restrict the extent to which Pakistan can flesh out a viable South Asia policy, outside its dynamics with India. 

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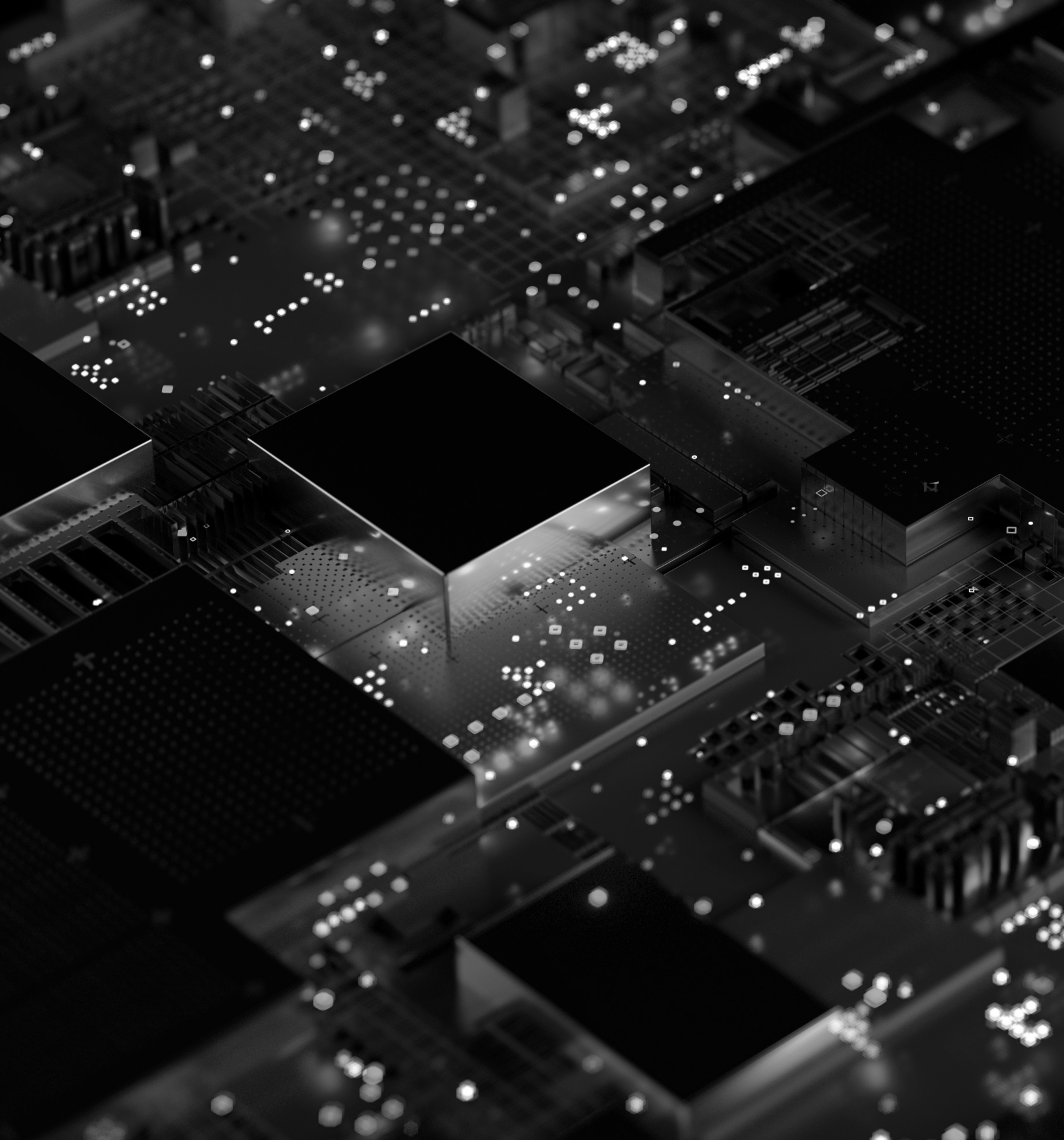
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