

ASSESSING INTERNAL AND EXTERNAL DYNAMICS IN PAKISTAN AND INDIA- PAKISTAN RELATIONS

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Director General, Centre for Aerospace Power and Strategic Studies (CAPSS), Air Vice Marshal Anil Golani, distinguished guests, ladies and gentlemen!

It is an honour to be invited to deliver the inaugural address at this National Seminar of the CAPSS! I am not quite sure as to how well equipped I am to deliver this address. Nevertheless, having accepted the invitation, I shall attempt to execute the task to the best of my ability.

In the intelligence business, the gold standard is the ability to speak truth to power. This is, of course, not an intelligence briefing but, conditioned as I am by long years of habit, I shall, in the allocated time, make an effort to put forward before this distinguished audience what, in my opinion, it needs to be told rather than what I think it may want to hear.

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Disclaimer: The paper is a text of the inaugural address delivered by the author at the national seminar organised by the Centre for Aerospace Power and Strategic Studies (CAPSS) on December 19, 2025, at India Habitat Centre, New Delhi.

My remarks are essentially in the form of broad observations, most of which, I am sure, will be addressed in greater depth in the substantive sessions to follow. Needless to add, these observations are meant to be illustrative and not exhaustive. Further, these views are personal and do not reflect those of any institution.

THE CONFLICT OF MAY

I begin with the four-day India-Pakistan conflict that took place between the night of May 6-7 and May 10, 2025. The first point to note is that the conflict was inconclusive. It resolved none of the underlying issues that continue to bedevil India-Pakistan relations and there is every chance that it will recur, in some form or the other, in the none-too-distant future. Indeed, it would be surprising if it does not, given that the operational capabilities of the terrorist groups focussed on attacking India have not been degraded in any meaningful manner. On the contrary, these malignant actors continue to leverage the latest advances in technology to communicate securely, move funds clandestinely, and deliver explosives payloads more devastatingly. At the same time, fast-moving political changes unfolding in our immediate neighbourhood—Bangladesh being the most obvious example that comes to mind—could reopen operational spaces that had been denied to these actors for a considerable length of time.

Secondly, like it or not, Pakistan, far from being deterred, seems to be emboldened. Its geopolitical profile has risen; the unprecedented toasting of its army chief at the White House and the signing of the Saudi-Pakistan Strategic Mutual Defence Agreement (SMDA) being two obvious examples. Within Pakistan, there is a widespread perception that it was successfully able to withstand Indian aggression and inflict significant losses on the adversary. Without the conflict of May, Pakistan's incumbent army chief would, in all likelihood, not have been promoted to five-star rank and the 27th Amendment to Pakistan's Constitution—creating the post of an all-powerful Chief of Defence Forces and further marginalising the civilian leadership—may not have been passed with such alacrity. Without the conflict of May, it is unlikely that Pakistan would have felt the pressing need to set up a Rocket Force Command in order to be able to engage targets in depth, Beyond Visual Range (BVR), as

and when the next round of multi-domain, contact-less operations unfold between the two countries.

INTERNAL DYNAMICS

There is, of course, a pronounced internal power-play dimension to the latest constitutional changes in Pakistan. Completely lacking political legitimacy, the Pakistan Muslim League (Nawaz) [PML(N)]-Pakistan People's Party (PPP) coalition government, installed at the federal level following the manifestly rigged general elections of February 2024, is in no position to stand up to the *diktats* of an ambitious, ruthless and, at the same time, insecure army chief who seeks lifetime immunity from the inevitable political payback that will eventually come, sooner or later, as it did in the case of several of his predecessors. The common objective of both sides, viz. the civilian government, on the one hand, and the military leadership, on the other—to ensure the continued marginalisation of the principal Opposition leader of the country who himself rode to power on the shoulders of his uniformed patrons before being brought down by them—has contributed in no small measure to a situation in which untrammelled power, including that of making war and peace, now resides in the hands of a single individual. As the icon of Indian intelligence, Rameshwar Nath Kao would have put it, here again we have an example of narrow, short-sighted considerations taking precedence over wider, long-term interests. This phenomenon has, of course, had more than one precedent in the politics of Pakistan.

RED FORT BLAST

The nature and extent of Pakistani involvement, if any, in the suicide car-bomb explosion near the Red Fort on November 10 is the subject of ongoing investigations and a clearer picture will emerge in the fullness of time. At the same time, it may not be out of place here to make a few fundamental observations about the counter-terrorism challenges that the incident has starkly highlighted.

From the time Pakistan-sponsored *jihadi* terrorism made an appearance in Jammu and Kashmir (J&K) in the early 1990s and, thereafter, spread to other parts of the country in subsequent

decades, India has confronted the twin *jihads* of the Inter-Services Intelligence (ISI) and the global variety. Both varieties, of course, subscribe to the same pernicious ideology and reinforce each other but it is useful to maintain a conceptual distinction for the purpose of clear understanding. The *jihad* of the ISI variety has been India-specific in targeting, and has been waged through the instrument of India-centric groups such as the Lashkar-e-Tayyeba and Jaish-e-Mohammed which have, by and large, refrained, at the instance of their masters, from operating in other theatres, barring the odd exceptions. Global *jihad* groups, including Al Qaida and its numerous offshoots as well as Islamic State (Daesh) and its regional chapters, have had India in their cross-hairs but their ambitions have been wider and included Pakistan as well. They also have a known interest in precipitating full-blown hostilities between India and Pakistan in furtherance of their objectives.

From an Indian perspective, what is of utmost importance is that Indian nationals, from J&K and the rest of the country, of both the blue and white-collar variety, have not participated in either of these *jihads* in large numbers. Among knowledgeable observers, there is a broad consensus that this is primarily because the guarantees enshrined in the Indian Constitution for the protection of the minorities have, by and large, been observed in both letter and spirit. In J&K, the separatist fringe and the aberrations of history aside, the vast majority of the populace has continued to have faith in the larger promise of socio-economic progress inherent in the Indian democratic process. India has, thus, been described as *Dar al-Amn* (Abode of Peace), as opposed to *Dar al-Harb* (Abode of War) by the Islamic clergy, making it doctrinally impermissible to conduct *jihad* here. This paradigm has largely held for the past several decades but if, for any reason, it is upended, our security challenges would multiply manifold. The neglect of genuine political grievances, wholesale stigmatisation of communities, imposition of collective punishments and other short-sighted measures that lead to feelings of alienation, loss of human dignity and hopelessness taking root among sections of our society that are vulnerable to radicalisation, therefore, need to be studiously avoided if Pakistan's malicious designs are to be effectively countered.

As one of India's best-known practitioners of counter-terrorism, who did more than most to administer Pakistan a "taste of its own medicine"—as he put it—has written:

The concept of victory as understood in a conventional war against another state does not apply to the unconventional war against terrorists ... The objective of the state must be to keep denying victory to the terrorists through better intelligence and better coordination, better analysis, better physical security and better follow-up action. Every time one manages to deny victory to terrorists through prevention or preemption, one makes progress in the fight against terrorism ... Success is the oxygen of the terrorists. You keep denying them success, they start withering away...

AFGHANISTAN

Pakistan's reliance on terrorism and proxy war for the covert achievement of political objectives has, of course, come full circle in Afghanistan where the concept of strategic depth dreamt of by the security planners in Rawalpindi and Islamabad has collapsed in a spectacular fashion. As a result, Pakistan today finds itself confronting an existential threat in the form of the very 'nutcracker' situation its spymasters and strategists wished to avoid: hemmed in from both east and west, its erstwhile protégés, the Afghan Taliban and their ideological brethren, the Pakistani Taliban now taking up arms in an effort to replicate in Pakistan the exact version of religious obscurantist rule that it sought to export. The decades-long experiment of exploiting the power of radical Islam to undercut the appeal of secular Pashtun nationalism, begun by the ISI during the rule of Zulfikar Ali Bhutto in the 1970s and nurtured by successive regimes, has finally reached its logical conclusion, with neither concessions nor the use of force—including bombing suspected terrorist hideouts in Afghanistan, fencing the border and closing it to normal trade and intercourse and the wholesale expulsion of Afghan nationals from Pakistan—being able to staunch the hemorrhaging.

A word of caution may, however, be in order here. Sardar Mohammed Dawood Khan, who served as prime minister under King Zahir Shah and, thereafter, as president of Afghanistan, played

the Pashtun and Baloch cards to the hilt, but had to eventually come round to making peace with Pakistan two years before he was overthrown in the Saur Revolution of 1978. Also, what applies to the Durand Line applies equally to the McMahon Line and, from a military and strategic standpoint, there can be no doubt as to which line is more important for India. Any derogation of the principle that borders cannot and should not be changed by the application of force, or the threat thereof, therefore, fundamentally militates against our interests.

CHINA

The US-China Economic and Security Review Commission, a bipartisan body set up by the US Congress to examine the national security implications of US-China economic relations, recently submitted its annual report for 2025, a practice that it has been following for the past quarter of a century. While some observations contained in the report could be disputed, the following lines merit serious attention. Under the subtitle “China Opportunistically Used Pakistan’s Military Crisis to Test and Promote Its Own Defence Capabilities,” the report notes:

Both countries (India and Pakistan) attacked targets farther into one another’s territories than at any time in 50 years ... While characterization of this conflict as ‘proxy war’ may overstate China’s role as an instigator, Beijing leveraged the conflict to test and advertise the sophistication of its weapons, useful in the contexts of its ongoing border tensions with India and its expanding defence industry goals. As Pakistan’s largest defence supplier, China provided approximately 82 per cent of the country’s arms imports from 2019 to 2023.

This clash was the first time China’s modern weapon systems, including the HQ-9 air defence system, PL-15 air-to-air missiles, and J-10 fighter aircraft were used in active combat, serving as a real-world experiment. China reportedly offered to sell 40 J-35 fifth generation fighter jets, KJ-500 aircraft and ballistic missile defence systems to Pakistan in June 2025. That same month, Pakistan announced a 20 percent increase in its 2025-26 defence budget,

raising planned expenditures to US\$ 9 billion despite an overall budget decrease.

The point to note is that Chinese intentions have remained constant. What has changed is that there has been an exponential improvement in China's technological and military capabilities. And it is precisely this aspect that has a direct bearing on the India-Pakistan equation because, as another well-known commentator has noted, post-May 2025, Pakistan is actively preparing to take on India at the "operational level of war," with assured Chinese support in critical areas, including Artificial Intelligence (AI)-enabled Cyber and Electro-Magnetic Activities (CEMA), integrated-fire strike capability and satellite technology-based missile targeting.

ECONOMY

With a Gross Domestic Product (GDP) of approximately US\$ 375 billion, a persistent GDP growth rate of less than 3 per cent, external debt exceeding 35 per cent of the GDP and some of the worst socio-economic indicators in the world, Pakistan's economy remains in shambles. Having narrowly avoided formal economic default in 2023, it has been kept afloat by a US\$ 7 billion Extended Fund Facility (EFF) bailout package by the International Monetary Fund (IMF) which, in a recent report, highlighted the extent to which widespread corruption across institutions has eroded the country's economic foundations. Tellingly, the report commented adversely on the functioning of the Special Investment Facilitation Council (SIFC), a vehicle that had been set up with the express blessings of the incumbent army chief to promote foreign investment in Pakistan. Perhaps, as a well-known Pakistani economist—known, among other things, for favouring the resumption of normal trade relations with India—observed recently, if the present unsustainable model of economic management continues, Pakistan may well cease to exist on the map in 20 years' time. A slow-motion unravelling of Pakistan, caused primarily by a collapsing economy, therefore, remains within the realms of the possible, although what precise shape and form such a process will take is hard to predict at this stage.

NARRATIVE SETTING

A brief word about cognitive warfare and narrative-setting, the importance of which cannot be over-emphasised. All reality may be the stories we tell ourselves but narratives that hew close to the facts usually prevail in the long term, while those that run far ahead of them eventually tend to prove counter-productive, not the least by engendering self-deception. Honest introspection would demand a dispassionate appraisal of the extent to which the narrative that all-is-well-in-Kashmir generated a lowering of guard that allowed Pahalgam to happen or underestimation of the effectiveness of Chinese military technology produced an unpleasant surprise in May.

NUCLEAR DIMENSION

Pakistani commentators have noted that the creation of a new Rocket Force Command—in response to India’s success in exploiting the “sub-nuclear space” that it now calls the “new normal”—represents a noteworthy evolution in Pakistan’s conventional deterrence posture; building a varied long-range “preemptive” strike capability suited for saturation strikes and mass salvos, thereby creating an additional conventional warfighting level below the nuclear threshold. Notwithstanding this, the strategic dimension can only be ignored at our peril. On this count too, the 27th Amendment to Pakistan’s Constitution raises fundamental concerns about the equilibrium of the country’s nuclear command and control mechanism, prioritising as it does, in the words of a Pakistani scholar, “speed and authority” over “diversity of judgement” and “institutional restraint” which, more than anything else, is the best guarantor of peace and stability in a crisis-prone environment.

CONCLUSION

India’s aspiration to fully realise its potential as a leading global power is contingent on our maintaining a consistent growth rate of at least 8 per cent for the next two decades or so. The achievement of that objective, it can well be argued, would depend on our being at peace with all our neighbours, including Pakistan, during this period. To put it slightly differently, a policy of maximum pressure

on Pakistan—political, diplomatic, military, economic, overt or covert—will have to be paired with a clearly defined and realistic end-state. The pursuit of such an end-state will necessarily involve a judicious mix of both incentives and disincentives, engagement and disengagement, not one or the other alone. Drawing, therefore, on the timeless wisdom of Kamandaki's *Nitisara*, may *prabhava shakti*, *utsah shakti* and, above all, *mantra shakti* form the basis of our actions!

I thank you for your attention and wish you all the best for the discussions to follow!

