



Strategic Shifts in India–Pakistan Relations

Emerging security dynamics, regional competition and prospects for stability

10–15 slide research-paper presentation | Executive summary first • Crux final

Executive Summary

Strategic shift: from episodic rivalry toward competitive coexistence under complex deterrence.

2025 Crisis

Direct military exchange under nuclear shadow
Pahalgam → strikes → ceasefire

Water Security

Indus Waters Treaty became a strategic flashpoint
From technical mechanism to national-security issue

New Domains

Drones, precision weapons, cyber and information warfare
Compressed decision time

- Traditional disputes remain unresolved, especially Jammu & Kashmir and terrorism allegations.
- Nuclear deterrence restrains total war but does not prevent limited conventional crises.
- Economic disengagement has removed a stabilizing constituency for peace.
- External alignments now connect the rivalry to the U.S.–China, India–China and Gulf strategic environment.
- Policy priority should shift to escalation prevention, treaty protection and structured risk reduction.

Research Framework

The paper explains what is changing, why it matters, and how both states can reduce escalation risk.

Research Question

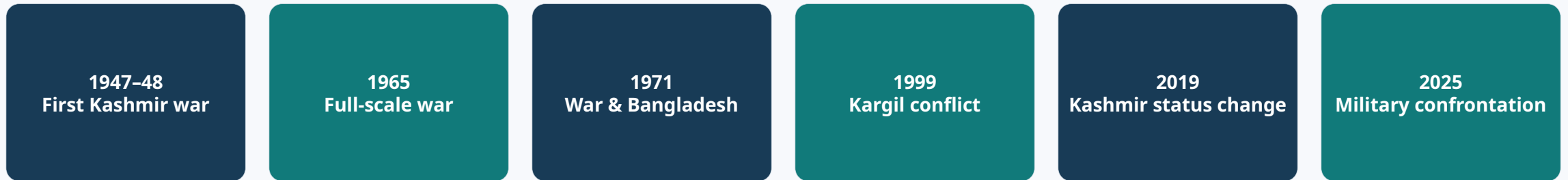
- How are security doctrines, technology, external alignments, water disputes and economic disengagement reshaping India–Pakistan relations?
- What policy framework can reduce conflict risk without requiring immediate comprehensive settlement?
- How did the 2025 crisis alter assumptions about deterrence and escalation control?

Objectives

- Identify key historical and recent drivers of strategic rivalry.
- Assess the 2025 crisis as a strategic inflection point.
- Evaluate Kashmir, Indus waters, nuclear deterrence and external actors.
- Develop practical risk-reduction recommendations for sustainable stability.

Historical Foundations of Rivalry

Partition, Kashmir and repeated wars created a durable security dilemma.



- The rivalry began almost immediately after independence in 1947.
- Jammu & Kashmir remains the central territorial and political dispute.
- The 1972 Simla Agreement emphasized bilateral resolution, but recurring crises repeatedly interrupted normalization.
- Historical grievance now interacts with nuclear deterrence, technology and geopolitical competition.

Seven Strategic Shifts

The relationship is no longer defined only by borders and diplomacy.

Dialogue → Disengagement

Border firing → Precision/drone conflict

Water cooperation → Water securitization

Traditional media → Information warfare

Conventional rivalry → Complex deterrence

Kashmir dispute → Wider security trigger

Regional rivalry → Great-power intersection

Kashmir, Diplomacy and the Collapse of Routine Channels

When normal channels shrink, crises become harder to manage.

Post-2019 Diplomatic Reality

- India treats the 2019 constitutional change as an internal matter.
- Pakistan rejects the change and views Kashmir as an unresolved international dispute.
- Diplomatic relations, trade and people-to-people engagement remain sharply limited.
- The political space for comprehensive dialogue has narrowed.

Stabilizing Lesson

- The 2021 Line of Control ceasefire showed that limited risk-reduction is still possible.
- Technical and military communication can function even without broad political normalization.
- The priority is rebuilding guardrails before the next crisis begins.

2025 Crisis: The New Escalation Pattern

A security incident escalated into direct military confrontation within days.

22 Apr
Pahalgam attack

Late Apr
Diplomatic retaliation & IWT
crisis

6–7 May
India: Operation Sindoor

10 May
Pakistan: Operation Bunyan-
ul-Marsoos

10 May
Military action halted

- India blamed Pakistan-linked militants; Pakistan denied involvement and called for a neutral investigation.
- The crisis combined diplomatic, water, information and military dimensions.
- The episode showed the speed at which modern capabilities can compress crisis decision-making.

Modern Conflict Domains

More options can mean more opportunities for miscalculation.

Precision strikes
Lower operational barrier to limited attack

Drones & UAVs
Surveillance, deception and strike roles

Air/missile defence
Central to escalation control

Cyber & information
Narratives shape public pressure

Nuclear signalling
Restrains total war but complicates choices

Compressed timelines
Leaders have less time to verify facts

- Strategic risk: a limited action intended as a signal may be interpreted as preparation for wider conflict.

Indus Waters Treaty: From Cooperation Mechanism to Strategic Dispute

Water has become one of the most consequential non-military flashpoints.

Why It Matters

- The Indus system is central to Pakistan's agriculture, food security, hydropower and rural livelihoods.
- The 1960 treaty survived wars and crises, making it a rare stabilizing institution.
- India's 2025 abeyance position and Pakistan's rejection intensified the dispute.

Strategic Implication

- Water is not easily substitutable like trade or visas.
- Treaty erosion would add a high-stakes resource-security dimension to future crises.
- Technical dispute-settlement channels should be protected from wider political escalation.

External Alignments and Regional Competition

The bilateral rivalry is now embedded in a wider strategic map.

Actor	Strategic Direction	Impact on India–Pakistan Relations
India	Deeper ties with U.S., Quad, Europe, Gulf	Pakistan becomes one part of broader Indo-Pacific and China-focused strategy
Pakistan	Deep partnership with China; CPEC and defence ties	Balances India but raises India’s two-front concerns
United States	India partnership plus crisis-management role	Useful de-escalation channel, but mediation legitimacy remains disputed
Gulf States	Strong ties with both countries	Potential diplomatic backchannel due to economic and diaspora interests
China	Strategic partner of Pakistan; rival of India	Links India–Pakistan rivalry to India–China competition

Economic Disengagement: The Missing Stabilizer

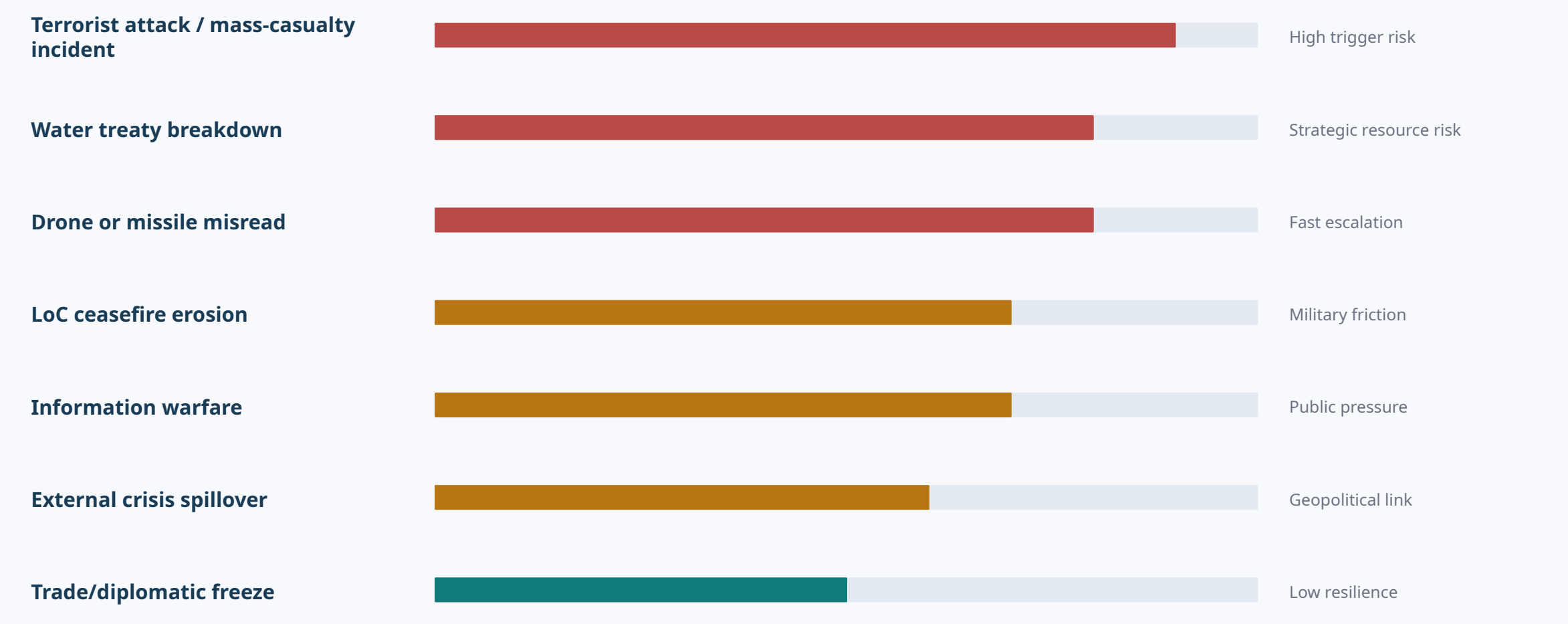
Low trade means fewer domestic actors have a stake in peace.

- Formal India–Pakistan trade remains far below its geographic and economic potential.
- Political restrictions and security tensions have weakened commercial interdependence.
- The absence of trade removes a possible constituency for stability.
- Selective restoration of low-risk trade can build confidence without requiring immediate settlement of core disputes.
- Economic resilience is also a pillar of national security for both states.

Strategic Logic
Economic links cannot guarantee peace — but total disengagement makes confrontation cheaper politically.

Risk Assessment: Future Crisis Drivers

Most dangerous risks arise where political pressure, military speed and uncertainty meet.



Strategic Risk Reduction Framework

A practical sequence: prevent crisis first, then rebuild cooperation.

I
Crisis Prevention
Hotlines, DGMO protocols, ceasefire
reaffirmation

II
Functional Cooperation
IWT technical channels, prisoners,
humanitarian visas

III
Economic Confidence
Selective trade, procedures,
business-to-business contacts

IV
Political Dialogue
Kashmir, terrorism, Sir Creek,
Siachen, water, regional
connectivity

- This framework does not require immediate settlement of every dispute.
- Its aim is to create guardrails so rivalry remains manageable and crises do not spiral toward war.

Final Crux: Competitive Coexistence with Guardrails

The strategic objective is not instant peace; it is preventing rivalry from becoming uncontrolled war.

Core Finding

India–Pakistan relations are shifting from conflict resolution hopes to risk-managed competition.

Biggest Risk

Modern technology and political pressure compress decision time during crises.

Best Path

Restore guardrails: ceasefire, hotlines, IWT channels, crisis protocols and selective engagement.

- Deterrence is necessary but insufficient; diplomacy and verification mechanisms are equally important.
- Water security and information warfare must be treated as escalation domains.
- Both countries benefit from protecting functional cooperation even during political disagreement.
- The most realistic near-term goal is: deterrence without perpetual crisis, competition without uncontrolled escalation, and disagreement without war.