Preparing for the Next War

Inside Pakistan's Bid to Reset the Balance with India

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Recommended Citation:

Abbas, Bashir Ali (2026). Preparing for the Next War: Inside Pakistan's Bid to Reset the Balance with India. New Delhi: Council for Strategic and Defense Research.

ABOUT THIS REPORT

This report examines how the 7–10 May 2025 India-Pakistan conflict has reshaped Pakistan's military thinking, procurement, and higher defense organization. Focusing on the period since the crisis, it traces the relative demotion of nuclear "full-spectrum deterrence" in favor of a conventional "Quid Pro Quo Plus" posture built for limited, stand-off, non-contact warfare. It assesses service-by-service acquisitions across the Air Force, Navy, and Army; the creation of the Army Rocket Force Command and the National Strategic Command; and the consolidation of military, and specifically Army, control over both conventional and nuclear forces under Field Marshal Asim Munir. It closes with Pakistan's effort to convert its claimed battlefield success into external partnerships and arms exports, largely financed by Saudi Arabia. The analysis draws on Pakistani official statements, doctrinal commentary, and open-source reporting through mid-2026 to map what may become a new South Asian missile race.

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Abbreviations

AEW&C – Airborne Early Warning and Control
AIP – Air Independent Propulsion
ARFC – Army Rocket Force Command
AWACS - Airborne Warning and Control System
BVR – Beyond Visual Range
CDF – Chief of Defence Forces (Pakistan)
CDS – Chief of Defence Staff (India)
CJCSC – Chairman, Joint Chiefs of Staff Committee
COAS – Chief of Army Staff
DEAD – Destruction of Enemy Air Defenses
DG-ISPR – Director General, Inter-Services Public Relations
DoD – United States Department of Defense
GOC-in-C – General Officer Commanding-in-Chief
HALE – High Altitude, Long Endurance
IAF – Indian Air Force
IRF – Integrated Rocket Forces (India)
KSA – Kingdom of Saudi Arabia
LACM – Land Attack Cruise Missile
LoC – Line of Control
MALE – Medium Altitude, Long Endurance
MMRCA – Medium Multi-Role Combat Aircraft
NCA – National Command Authority (Pakistan)
NFU – No First Use
NSC – National Strategic Command
PA – Pakistan Army
PAF – Pakistan Air Force
PLA(N/AF) – People's Liberation Army (Navy/Air Force)
PN – Pakistan Navy
QPQP – Quid Pro Quo Plus
SEAD – Suppression of Enemy Air Defenses
SLCM – Submarine Launched Cruise Missile
SMDA – Strategic Mutual Defense Agreement (Pakistan-Saudi Arabia)
SPD – Strategic Plans Division (Pakistan)
SSBN – Ship, Submersible, Ballistic, Nuclear
SSN – Ship, Submersible, Nuclear

EXECUTIVE SUMMARY

The 7–10 May 2025 conflict with India is the pivot around which Pakistan's military procurement and doctrine have since reorganized. This report assesses those shifts and argues that Pakistan's defining adjustment is its move to both deter and exploit the space for limited, "non-contact" conventional war that it accuses India of opening across the 2016, 2019, and 2025 crises. Doctrinally, Full Spectrum Deterrence has receded into the background. In the foreground is "Quid Pro Quo Plus," a posture intended to respond to Indian stand-off strikes with higher-order reciprocal conventional strikes rather than nuclear signaling. Having failed to deter the normalization of Indian limited operations, Pakistan now prepares for their recurrence. In May 2025, it deliberately prolonged the crisis through deniable low-intensity drone attacks and cross-LoC shelling, seeking to refocus international attention and undercut India's de-hyphenation, then accepted a ceasefire once the IAF struck its airbases unopposed on 10 May.

Service by service, the trajectory runs from catching up to out-matching. The Air Force, treating 7 May as proof of concept for network-centric warfare, is pursuing fifth-generation fighters (the J-35 and a co-produced Turkish KAAN), longer-range air defenses, AWACS, more J-10Cs, and locally built Baykar drones, aware that the edge from 7 May was lost by May 10. The Navy's induction of the first AIP-equipped Hangor-class (Yuan Type 39A) submarine is judged the single most significant post-crisis development: it widens the sea-denial reach and is the more likely carrier for a torpedo-launched, sea-based nuclear deterrent, quietly advancing the triad ambition. The Army's principal "acquisition" is authority itself.

Two organizational changes matter most. The Army Rocket Force Command centralizes conventional missiles (including the 750 km Fatah-IV) and, for the first time, formally separates Pakistan's conventional missile force from its nuclear one, signaling a willingness to fight below the nuclear threshold even as it dilutes the credibility of the nuclear threat. The National Strategic Command, created under the 27th Amendment, institutionalizes Army control over the arsenal and effectively voids civilian oversight; the NCA was not convened in 2025.

Abroad, Pakistan is monetizing its self-declared "victory" through a secret Saudi mutual-defense pact (more industrial and financial than operational), troop deployments for Gulf financing, and a Saudi-funded arms-export drive.

The central caution is that capability, not intent, is what really restrains Pakistan, so sharper precision-strike tools could raise its incentive to keep staging the sub-conventional provocations that set off these crises.

INTRODUCTION

The May 7-10, 2025, military conflict with India bore significant lessons for the Pakistan Armed Forces. Admittedly, military lessons are a continuous process, shaped both by conflicts elsewhere in the world as well as by the institutional memory of Pakistan's own past conflicts with India. The May conflict is only the latest in a series of engagements, alongside the Pakistan military's continuing military engagements against Afghanistan and non-state actors internally and externally. However, this report will deliberately focus on the April/May crisis and assess key developments in Pakistan's military acquisition and procurement decisions since.

EVOLUTION OF PAKISTAN'S NUCLEAR/CONVENTIONAL DOCTRINES BEFORE AND AFTER THE MAY 2025 CRISIS

DETER WAR, PREPARE FOR CRISES

Since 1998, the Pakistan military has relied on its nuclear deterrent to prevent India from engaging in a conventional war with Pakistan, where the Indian military undoubtedly holds the advantage. Even as Pakistan has continued aggression in the sub-conventional domain through its policy of enabling cross-border terrorism, its nuclear doctrine (officially unwritten) has come to reflect a "full spectrum deterrence" posture, where Islamabad/Rawalpindi deliberately introduces an entanglement between the strategic and tactical spaces through battlefield nuclear weapons and a non-commitment to no-first use.[1]

Unofficially, Pakistani officials, such as Lt Gen Khalid Kidwai, have espoused territorial, economic, political, and military redlines for Pakistani nuclear use (notwithstanding the continuing debate over the doctrinal value of this formulation).[2] Officially, Pakistan has consistently maintained that it is capable of matching India's conventional threat with its own conventional capabilities, without reliance on its nuclear arsenal. For perspective, Pakistan's test of the short-range ballistic missile Nasr (or Hatf-IX) in 2011 confirmed its readiness to use battlefield nuclear weapons (despite questions over command and control), especially in the wake of India's then-emerging Cold Start doctrine. However, Pakistani articulations of its response maintained that it could match the Cold Start conventional threat, with its own "new concepts" of conventional warfighting, which it sought to demonstrate through its Azm-e-Nau (literally meaning New Resolve) exercises between 2009 and 2013.[3]

Nonetheless, it became clear to Pakistan, through the crises of 2016, 2019, and 2025, that India had moved towards short, limited, punitive action against Pakistan using ground forces in 2016 for "surgical" operations not aimed at taking territory; increasingly stand-off means in 2019; and then at a larger scale in 2025. Especially following these latter two engagements, Pakistani strategic articulations began popularizing a "Quid Pro Quo Plus" doctrine that is designed to tackle this new dynamic in India-Pakistan crises, even as Full Spectrum Deterrence caters to

Pakistan's need to deter larger wars featuring force-on-force land/naval/air action (last seen in 1971).[4] Since Pakistan refuses to accept India's view of the sub-conventional rung action (a terror attack) as being the first rung on the escalation ladder, its QPQP doctrine is functionally meant to respond to Indian conventional strikes with higher-order reciprocal strikes. Since the April/May 2025 crisis with India, Pakistan's strategic discourse has been dominated by articulations of QPQP as including short, swift, and decisive operations,[5] relying on network-centric warfighting, and premised on escalation domination.[6]

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Essentially, then, while Pakistan's post-1998 focus of deterring Indian conventional action through its nuclear deterrent remains in the background, Pakistan has sought to adapt to and prepare for normalized Indian cross-border limited operations, having failed to deter such normalization. That preventing such normalization has been a longstanding Pakistani objective, and that Pakistan is now preparing for such recurring limited (presumably stand-off) crises, was further evidenced by comments made by Lt Gen Nauman Zakaria on May 30, 2026, at the Shangri-La Dialogue. Stating that "we have seen since Operation Parakram (2001-02), Indians trying to create the notion of space for war under the nuclear overhang," space which Pakistan sought to "debunk" in 2025. Gen Zakaria further added that India's strategic thinking had

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evolved to show that this space would now be utilized principally through “non-contact warfare.” [7] That Gen Zakaria is also the first Commander of Pakistan’s new Army Rocket Force Command – a conventional force – cements the evolution of the Pakistan military’s own thinking. The ARFC’s novelty is assessed later in this report.

EXPLOIT CRISES, COMPEL RE-HYPHENATION

While Pakistan has sought to deter larger Indian conventional action and full-scale war, the April/May crisis of 2025 was also peculiar in that Pakistan deliberately sought to prolong the crisis.

This was especially evident in the choice of low-intensity platforms on May 8 and May 9, to attempt to (mostly unsuccessfully) overwhelm Indian air defenses, especially through small platforms such as the Turkish Asisguard Songar drones.[8] Crucially, these nights featured Pakistan denying any accountability for these drone attacks, unlike India’s retaliatory drone and missile strikes, which New Delhi publicly owned. On May 8 and 9, DG-ISPR explicitly denied that any Pakistani drones or missiles had crossed over into India, asserting that “…what we are doing is responding with small arms fire to Indian military posts targeting civilians across the LoC.”[9] Pakistani cross-LoC shelling, at the same time, served as a non-escalatory action that could be claimed, since it was both an intensification of routine (pre-2021) exchanges of fire at the LoC and a means for Pakistan to display continued military engagement with India. That the DG-ISPR directly linked his denial of Pakistani drone attacks with Pakistani cross-border shelling highlights this misdirection.

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A core element of Pakistan’s rationale to prolong the war was the need to refocus international attention to the sub-continental faultline and undermine India’s policy of de-hyphenation. When Pakistan finally claimed its own operation (termed Bunyan al Marsous) on May 10, it deployed more advanced platforms such as its indigenous Fatah II long-range guided rockets.[10] While there are no internationally verified reports of these rockets hitting their targets (Indian military installations near the border as well as in the hinterland), Pakistani adherence to a ceasefire on the same day (despite the IAF’s May 10 strikes having caused significant damage across Pakistani airbases) showed that it was not interested in a broader war after crisis termination. This inference needs to be viewed alongside the fact that Indian military assets proved more effective at degrading Pakistani capabilities, which would undoubtedly have also influenced Pakistani intent vis-à-vis crisis termination/prolongation.

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As a result of the conflict, the Pakistan Air Force, in particular, views itself as the principal service for achieving decisive victories in future wars, especially given its claimed successes on May 7. In the public domain, Pakistani military analysts focus on the PAF's success in conducting "smart, integrated and multi-domain operations", using "J-10s, JF-17s, PL-15 BVR Missiles, AWACS aircraft, electronic warfare and overall superior air defense", which has made it the "frontline instrument of deterrence".[11] However, the PAF being kept out of action completely on May 10 proved two things:

1. The IAF's tactical adjustments after May 7 undercut the PAF's ability to re-engage IAF assets that remained deeper in Indian airspace.

2. The PAF kept focus on its May 7 gains without risking its own losses on May 10. This is evident in Pakistan's championing of Indian losses on May 7 as the decisive marker of victory in the conflict. An engagement on May 10 would risk undercutting this narrative if PAF either failed to replicate May 7's performance or suffered losses of its own aircraft.

The Pakistan Navy continued to be viewed by the military establishment as a force to be kept in reserve, meant only for counter-escalation. Contingent on India not opening hostilities on the naval front, Pakistan's priority was to keep its naval assets out of harm's way. Conceptually, this was a scaled-up replay of 2019.

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PAKISTAN AIR FORCE – FROM CATCHING UP TO OUT-MATCHING

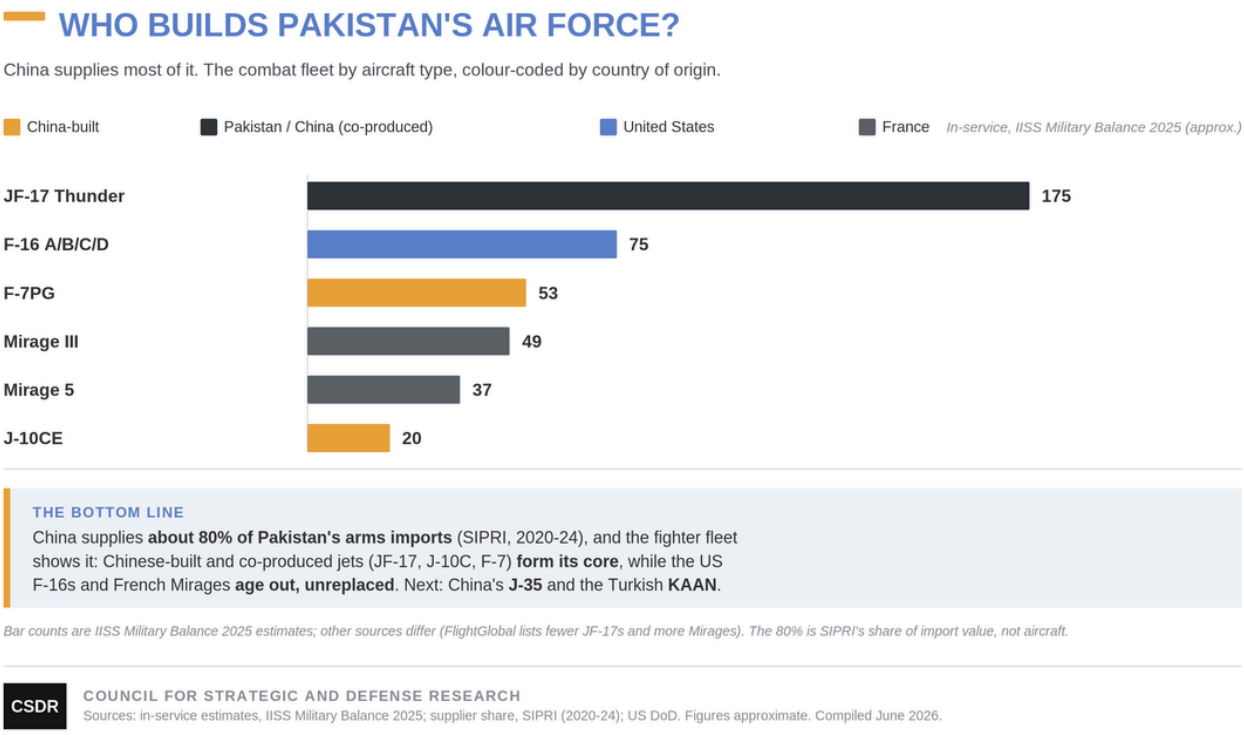
Following India's 2019 airstrikes, Pakistan maintained a concerted focus on countering India's new Dassault Rafale 4.5-generation fighter and its S-400 long-range air defense system. This was due to two reasons:

First, Pakistan had to rush to match India's qualitative capabilities, especially since the IAF was quicker to induct the Rafale. Despite India's own MMRCA quagmire and its abandonment, India purchased 36 Rafale fighters off the shelf through an Inter-Governmental Agreement in 2016, with all aircraft delivered between 2020 and 2022. Consequently, Pakistan placed its own orders for China's Chengdu J-10CE aircraft, receiving 20 jets in two batches across 2022. By early 2025, US DoD reports confirmed that 16 more aircraft were on order – to bring the PAF's J-10 fleet to 36.[12]

Notably, Pakistan's interest in buying 36 aircraft long predates India's own purchase of 36 Rafales, with the workings of a China-Pakistan deal having been in the public domain since the late 2000s.[13] As a result, PAF pilots garnered vital flying experience on the aircraft in China prior to the 2022 acquisition and participated in joint exercises with the PLA Air Force post-induction.[14] Expecting Indian Rafales to feature Meteor missiles, Pakistan's 2021 J10 deal with China also included the PL-15E long-range air-to-air missiles for beyond visual range combat (which PAF could evidently also fit on the hardpoints of the jointly Chinese-Pakistani manufactured JF-17 Block III).[15]

Pakistan's former Prime Minister Imran Khan sits in the cockpit of the Chinese J-10 C combat aircraft as he is briefed during the induction ceremony at the Pakistan Air Force (PAF) base in Kamra, Pakistan, March 11, 2022. Source: Reuters

Second, the PAF's core learning from the 2019 conflict with India was that it misread Indian intent as it observed Indian fighters while still in Indian airspace. In the assessment of Air Cdre Kaiser Tufail (PAF Director of Operations during Kargil), this was because – first, the hostile intentions of the IAF fighters could not be read as they were flying within Indian territory and Pakistan could not fire first and "be accused of unprovoked aggression", and second, that the IAF fighters "turned back rapidly" and could not be chased as the release of bombs "was discovered only after some time".[16] The PAF also noted during IAF's Op Bandar that Indian Mirage 2000s were able to deliver ordnance from as far as 40 km away from their targets. However, with the precedent of cross-border aerial strikes for the first time between two nuclear powers set, Pakistan sought to prepare for such strikes in the future. Platforms such as the J-10CE (a multi-role aircraft specifically optimized for intercepting roles) then, arguably, became imperative to acquire.



Following the precedent of cross-border aerial strikes in 2019, Pakistan sought to prepare for future such strikes. Platforms such as the J-10CE then, arguably, became imperative to acquire.

In the 2025 crisis, too, there were twofold lessons for the PAF.

First, the PAF's PL-15E-equipped J-10CEs performed well on May 7. However, they failed to prevent India from carrying out its counter-terror mission with Indian fighters delivering ordnance deep into Pakistani Punjab. However, the fact that India's May 7 combat losses were likely due to Indian military intelligence failure (in estimating the range of the PL-15's export variant) and not due to objective Pakistani superiority was evident on May 10 when the IAF rectified its earlier "tactical mistakes"[17] during its strikes against key Pakistani airbases and strategic sites. That the IAF faced no surface-to-air or air-to-air threat to its fighters during an offensive mission on May 10 and suffered no losses proved that the PAF's May 7 advantage was decisively lost. This also proved that Pakistan's HQ-9P air defense systems (modeled on the Russian S-300, manufactured in China, and inducted by Pakistan in 2021) were either significantly destroyed by Indian SEAD/DEAD strikes on May 8/9, or that IAF jets were flying well out of their interception range. For Pakistan, both of these possibilities are likely to be mitigated by either a significantly greater range (especially if IAF fighters operate from even deeper within Indian airspace in the next conflict) or markedly improved stealth capabilities in its fighter fleet.

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Second, unlike the period following the 2019 conflict (which occurred three years after India's Rafale purchase), Pakistan now seeks to outmatch (and not catch up to) the IAF's capabilities. This would mean securing a fifth-generation fighter aircraft (either co-produced or purchased in flyaway condition), acquiring advanced air defense systems with longer interception ranges, more advanced AWACS platforms, as well as more 4.5-generation fighters that are faster/stealthier than India's 114 Rafales (on order), among a range of other systems. Notably, these are likely to be either Turkish or Chinese – the two principal suppliers of advanced platforms to the Pakistani military over the last decade.

Given Pakistan's touting of its network-centric warfighting in 2025, which uses both ground and airborne sensors to guide fighters, it would arguably seek to deploy more Chinese-made systems. Practically, this could mean expedited acquisitions of platforms long on the PAF's radar. These include the Shaanxi KJ-500 AEW&C aircraft, which can be operated alongside existing Shaanxi ZDK-03 aircraft fitted with AESA radars; the fifth-generation Shenyang J-35, which the PAF Chief announced in January 2024 that Pakistan would buy,[18] and for which Pakistani pilots are reportedly already flying on in China (similar to their experience with the

J-10C),[19] a larger number of J-10C fighters, as well as the HQ-9BE and HQ-19 air defense systems for extended-range interception of ballistic missiles and drones. Moreover, Pakistan also looks to replicate its model of jointly producing the Babur Class corvette with Turkey (under its MILGEM program) for fighter production. In January 2025, Turkey and Pakistan reportedly agreed to establish factories to jointly produce Turkish Aerospace Industries' fifth-generation KAAN fighter jet, for which Pakistan has long shown interest.[20]

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These acquisitions/procurements are likely to be accompanied by further improvements to existing JF-17 Block III fighters, including the integration of hypersonic weapons such as the CM-401 hypersonic anti-ship ballistic missile, which Pakistan seeks to counter India's sea control operations during crises.[21] Ultimately, in the aerial domain, presumed to remain the preferred theatre for stand-off military clashes, the key lesson for Pakistan is the need to prepare for wars in which the IAF is prepared to fight at even longer ranges, with even greater separation between the two belligerents.

Additionally, while Pakistan successfully used drones to prolong the conflict in 2025, the next war would likely feature the use of more advanced, larger, MALE or HALE Unmanned Combat Aerial Vehicles. Here too, Turkey is key. As the Iran war has proven, counter-drone systems do not guarantee a high success rate, even as they progressively improve across battlefields from Ukraine to the Persian Gulf. Given Pakistan's history, Islamabad is likely to view/frame its own fight against India as similar to Iran's against the United States, even as Pakistan is a nuclear power with the world's seventh-largest military. Here, apart from Turkish drones already having affected the South Asian battlefield in May 2025, several drones produced by Turkey's Baykar Technologies have been key to shaping the conflict in Europe. Over the months following the crisis, Baykar has deepened its relationship with the Pakistan Air Force, having already invested in the PAF's National Aerospace Science & Technology Park,[22] and both have agreed

to set up production lines in Pakistan for the Bayraktar TB2 & Akinci HALE drones to enhance long-range surveillance and strike depth.[23] By April 2026, the Pakistan Air Force had also conducted its first successful test of the 600km range Taimoor ASCM, first unveiled in 2022.[24]

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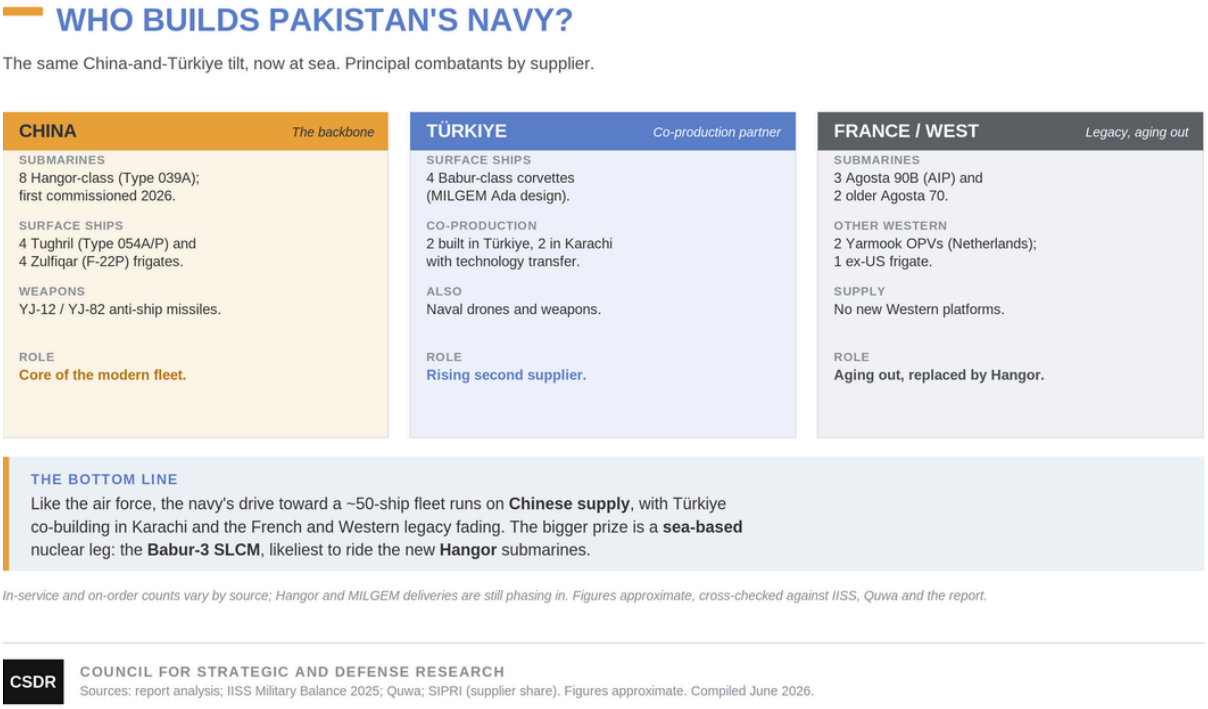
PAKISTAN NAVY – WATERSHED ACQUISITIONS

The Pakistan Navy has been historically and consistently vulnerable to the Indian Navy. The PN has long been the only South Asian navy to operate diesel-electric submarines with Air Independent Propulsion (Agosta 90-Bs) using the French MESMA system, which has given it a qualitative edge in conventional attack submarines,[25] especially as India itself waits for its first AIP-enabled submarine – either a retrofitted AIP system aboard its Kalvari class or new Type 214 submarines from Germany under India's Project 75-I.[26] But the PN has always focused on relegating itself to its westernmost bastion ports during crises or conflicts, both to avoid inadvertent escalation and to prevent losses to its quantitatively superior fleet in land- and air-focused actions that do not have any grand territorial outcome attached.[27]

Regardless of the April/May crisis, the Pakistan Navy's acquisition and procurement focused on taking deliveries of advanced platforms as a result of watershed deals signed in the years prior to the crisis, with a view to eventually building the PN to 50-ship strength.[28] These include the PNS Khaibar (one of four MILGEM corvettes, Babur class) delivered by Turkey in December 2025,[29] which boosts the PN's surface capabilities alongside China's Type 053H3 (Zulfiqar class) and Type 054A/P (Tughril class) frigates armed with YJ-12 supersonic anti-ship missiles. More importantly, the PN inducted the first of eight Chinese Type 39A Yuan class submarines (named the Hangor class) in April 2026.[30] The AIP-enabled Yuan class is reportedly also the quietest submarine in the PLAN fleet, displaces over 1000 tons more than Pakistan's French Agosta 90B submarines, and (crucially) is capable of firing anti-ship cruise missiles such as the YJ-82, along with torpedoes.[31] That the Hangor class is a technological leap for the Navy was evident in the presence of both President Asif Zardari and PN Chief Adm Naveed Ashraf at the commissioning ceremony on Hainan Island, China.[32]



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The PN's induction of the Hangor class alone does not fundamentally alter the maritime strategic landscape of the Indian Ocean, except for the period that the qualitative imbalance between Pakistani and Indian conventional attack submarines increases until India acquires its own AIP-equipped submarines, finishes the mid-life upgrades of its existing Scorpene class attack submarines, and acquires a new class of nuclear powered attack submarines (by which time India would theoretically also have phased out its remaining six operational Kilo class submarines).[33] The timelines for Pakistan Navy's continued acquisition of advanced platforms and for India's phasing in new submarines and phasing out older platforms will determine the balance of power beneath the Arabian Sea in the short- to medium-term. Nonetheless, India's combined naval capabilities have thus far kept the Pakistan Navy out of action at least twice in the last decade, particularly by combining assets from its Western and Eastern Fleets to achieve more effective sea control.

On December 17, 2025, the fourth Hangor-class submarine of the Pakistan Navy, named “GHAZI”, was launched at Wuchang Shipbuilding Industry Group Company Ltd, Shuangliu Base at Wuhan, China. Source: Naval News

The true shift that the Hangor’s acquisition reveals is in the Pakistan Navy’s own view of operations. As the Yuan-class Type 39A’s history of development in China shows, the submarine was designed for open-ocean operations to service the needs of the PLAN’s near-seas active defense strategy by improving on China’s older Song class,[34] rather than being a

> For the Pakistan Navy, the Hangor class theoretically allows it to move beyond the Agosta 90Bs’ green-water focus. A larger number of Hangor-class boats, along with the PN’s redoubled focus on acquiring long-range missiles (especially post the May conflict), indicates the potential for the PN to expand its sea denial capabilities, especially with a platform featuring a quieter design and the ability to conduct longer durations of submerged operations.

platform meant for extended submerged operations from shallow littorals.[35] Its armament (with no reported vertical launch tubes) also prevents it from being classified as a guided missile submarine, even as it is able to launch YJ-82 ASCMs through its torpedo tubes. However, for the Pakistan Navy, the Hangor class theoretically allows it to move beyond the Agosta 90Bs' green-water focus. Even as the incumbent PN Chief, Adm Naveed Ashraf, has consistently maintained (in line with the PN's 2018 maritime doctrine) that the force does not seek blue water roles like the Indian Navy, a larger number of Hangor-class boats, along with the PN's redoubled focus on acquiring long range missiles (especially post the May conflict),[36] indicates the potential for the PN to expand its sea denial capabilities especially with a platform featuring quieter design and the ability to conduct longer durations of submerged operations.

Even as the PN is still unlikely to aim at power projection distant from its shores, the Hangor invariably acts as an enabler for a more expanded area of operations in the Arabian Sea, potentially disrupting the ease with which the IN has affected sea control thus far. For the PN, this acts as a midway between breaking out into a larger force (beyond 50 ships) and focusing on projecting more power within an objectively limited ambit of operations with quantitatively limited assets.

Ultimately, the net risk in the Indian Ocean will increase only if the Pakistan Navy also adopts such a mid-way approach to operationalize the sea-leg of Pakistan's nuclear deterrent.[37] Both Pakistan's consistently held objective of operating a nuclear triad[38] and its complete lack of officially stated intent to pursue either SSNs or SSBNs run counter to each other when viewed through a naval historical lens, since SSBNs principally form the maritime component of a nuclear triad.

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As the PN's acquisitions currently stand, Pakistan has the potential to leverage a significantly quiet, AIP-equipped conventional submarine (better than a non-AIP SSK but less ideal than an SSN/SSBN) to achieve sea-based nuclear capabilities, especially with short patrol times. Pakistan would not be the first to adopt this, given Israel's reportedly similar choices[39] with its Dolphin-class AIP-equipped German 212 submarines.[40] Both Pakistan's testing of the nuclear-capable Babur SLCM (reported range of over 400km) from underwater pontoons (and simulated torpedo tubes) show its intent for such capabilities.[41] Evidently, the fact that Pakistan's Agosta 90B submarines have never been used for a Babur SLCM test (insofar as lack of reportage suggests), despite being AIP-equipped, also shows that the PN failed to secure the requisite modifications to fit the missile. Regardless of whether the larger Hangor class can fire the Babur SLCM, it is the likelier candidate for Pakistan to search for a torpedo-launched nuclear-tipped sea-based deterrent in the long term. Hence, collectively, these make Pakistan's induction of its first Hangor-class submarine the most significant defense development post the April/May crisis.

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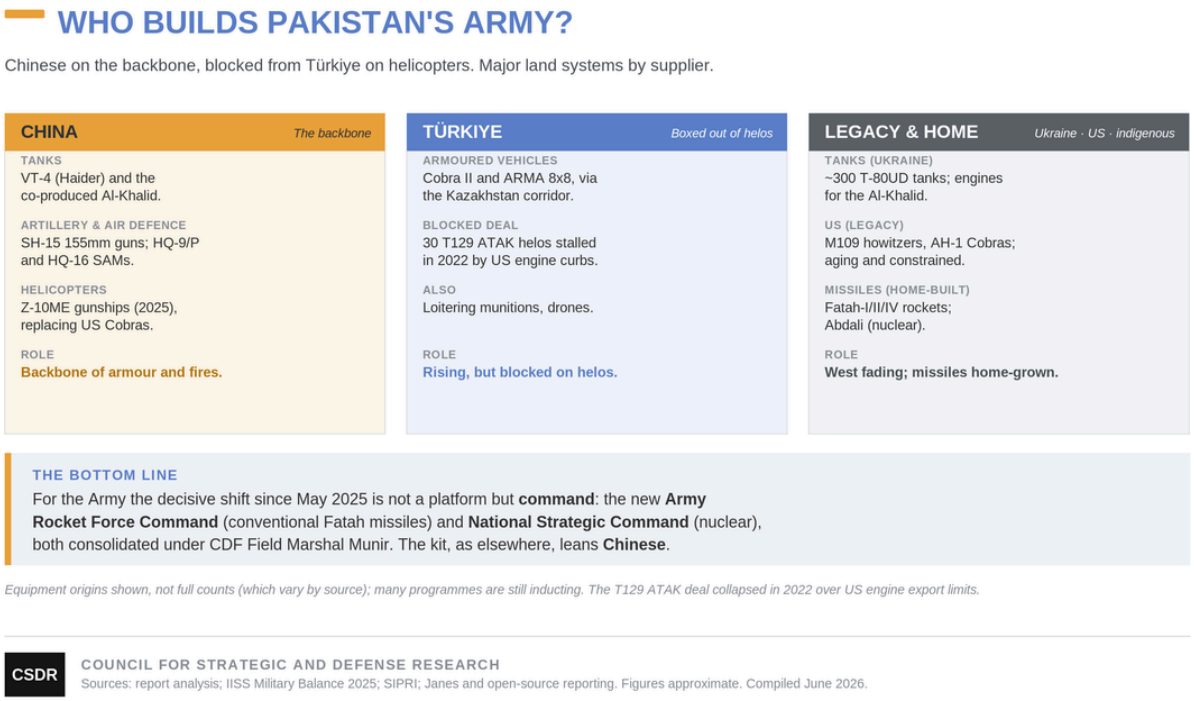
PAKISTAN ARMY – POWER AS THE MAIN ACQUISITION

In the April/May crisis, it was undoubtedly the Pakistan Air Force that served as Pakistan's principal instrument of choice and garnered the bulk of operational experience. The Pakistan Navy, too, while not having engaged in combat, was more visible in Pakistan's strategic messaging (compared to past conflicts), given the presence of VAdm Raja Rab Nawaz (Deputy CONS) in ISPR briefings during the conflict in May.[42] It is also these two services that are focused on acquiring new-generation advanced platforms (such as the J35 fighter or the Hangor-class submarine). The Pakistan Army, on the other hand, remains focused on its overall controlling role, with the COAS now having secured a vast ambit of operational authority. Viewed against the Pakistan military's current organizational structure, both the PN's and PAF's acquisitions are also the Army's acquisitions, given that ultimate operational authority now lies with the CDF.

Arguably, the acquisition that best characterizes a generational shift, even for the PA, is the Z-10ME attack helicopter, equipped with the TY-90 missile (specifically designed for helicopter combat, weighing only 25 kg and measuring just over 2 meters long).[43] Here too, as with the PAF's and PN's acquisitions, Pakistan focused on expedited deliveries of platforms it had long been interested in, but was incentivized to acquire them only after India's capabilities increased.



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The Z-10ME can then be viewed as a direct counter to the Indian Army's American-designed Apache AH-64 attack helicopters. Similar to the PAF's shift in focus from catching up to out-matching, the PA looks to leverage its special relationship with China to acquire a larger number of such platforms within a short timeframe (with the first delivered in July 2025), compared to the supply chain strains evident in the India-US Apache ecosystem. The Indian Army had to endure significant delays in receiving a batch of six AH-64s,[44] with the last delivered by December 2025.[45] Nevertheless, India's overall quantitative advantage will arguably remain, especially if delivery timelines (with 2028 and 2033 milestones) for its indigenous Prachand Light Combat Helicopter do not suffer from further delays.[46]

Crucially, rather than the acquisition of advanced platforms for the Pakistan Army, it is its new command responsibilities since May 2025 that have represented the biggest changes in Pakistan's higher defense organization.

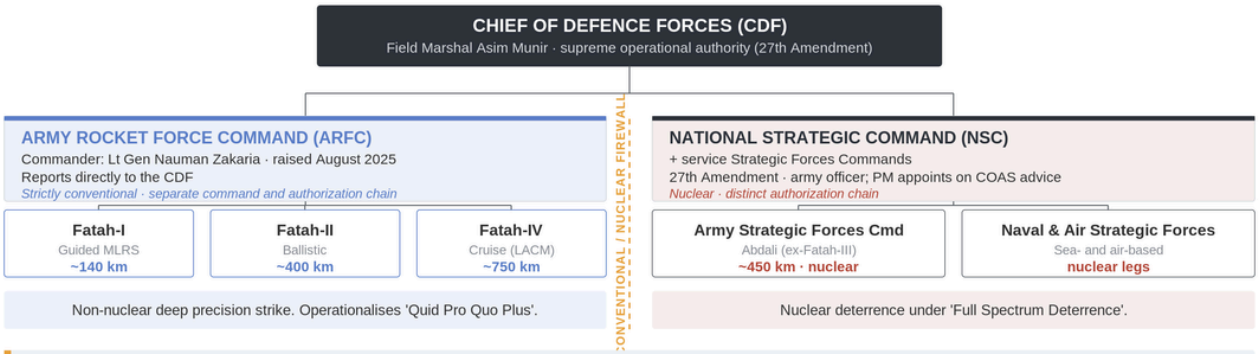
PAKISTAN ARMY ROCKET FORCE COMMAND

Three months following the May clashes, Pakistan announced the creation of a new Army Rocket Force Command (ARFC) on August 14, with PM Shehbaz Sharif explicitly deeming it as strengthening Pakistan's "conventional war capability" and a senior Pakistani official making it clear that the force was aimed at India.[47] Following the 27th Amendment, it also became clear that the three-star general who would lead the force would directly answer to the CDF. This role eventually went to Lt Gen Nauman Zakaria, GOC-in-C, I Corps. Interestingly, as its first and incumbent commander, Gen Zakaria publicly discussed the ARFC and its context of creation less than a year after its formation, at the May 2026 Shangri-La dialogue, which provides valuable evidence for this report's arguments in subsequent paragraphs.[48]

> The ARFC's creation was evidently catalyzed by the 2025 conflict, in which Indian BrahMos cruise missiles successfully penetrated the Pakistani air force and struck strategic sites such as Nur Khan Airbase, Rawalpindi.

INSIDE PAKISTAN'S NEW ROCKET FORCE

A conventional missile command, deliberately walled off from the nuclear chain, under the CDF.



Structure compiled from the report and public statements (Gen Zakaria, Shangri-La Dialogue 2026); some details (e.g. the NSC commander's rank) are unspecified. Ranges approximate.

Meant to centralize control over Pakistan's conventional missile forces,[49] the ARFC's creation was evidently catalyzed by the May 2025 conflict, in which Indian BrahMos cruise missiles successfully penetrated the Pakistani air force and struck strategic sites such as Nur Khan Airbase, Rawalpindi (under 5 km from the Pakistan Army's General HQ). Even as Pakistan has never accepted India's formal characterization of the air/land/sea-launched BrahMos as a conventional-only missile, the ARFC's creation is only the latest in a years-long cascading effect across the sub-continent and potentially marks the start of a new missile race.

While China's PLA Rocket Force was the first in Asia to be established as a distinct force responsible for all of China's conventional and nuclear missiles, India announced the creation of its own Integrated Rocket Force (IRF) in September 2021, with a focus on India's Eastern border with China.[50] Chinese and Indian troops had clashed just the previous year at the Galwan Valley in June, triggering the Indian movement of multiple vectors to the Eastern front.[51] However, as of 2026, the IRF is yet to be fully operationalized, with full control over India's conventional missile suite, which would reportedly include the BrahMos supersonic cruise missile, the Nirbhay subsonic cruise missile (still under development), the Pralay short-range tactical ballistic missile, and the Pinaka multi-barrel rocket launcher.

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For Pakistan, the ARFC reportedly commands the Fatah-I and Fatah-II, indigenous conventional short-range guided rocket systems often also categorized as 140km- and 400km-range conventional ballistic missile systems, and the Fatah-IV, a reportedly 750km-range land-attack cruise missile unveiled by Pakistan in August 2025.[52] While the missile (with a claimed circular error probable of five meters) represents the Pakistan military's sharpened focus towards precision strike capabilities, the Fatah IV's inclusion within the ARFC's ambit of control would indicate a conventional role. The missile, viewed by Pakistani analysts as a conventional LACM derivative of the Babur LACM/SLCM, further supports this possibility.[53] Curiously, the shorter-range (450kms) ballistic missile of the Fatah series, Fatah-III, was reclassified as the Abdali Weapons System by Pakistan in 2025 and tested by the Army Strategic Forces Command (confirming the missile's nuclear role) in the lead-up to the May clashes.[54] In contrast, it was the Pakistan ARFC that was named as the supervising body for Pakistan's April 2026 test of the

Fateh-II missile system.[55] Pakistan deployed the Fatah II system against India in May 2025, but the interception by Indian air defenses underscores the need for Pakistan to continue improving the system's effectiveness.

Presently, the key difference between China's, Pakistan's and India's rocket forces is the question of nuclear entanglement – China, which despite being a formal NFU state deliberately combines both conventional and nuclear forces; India, which as a formal NFU state explicitly de-links its conventional missile force from its strictly nuclear ballistic missile force; and Pakistan which despite being a non-NFU state now also distinguishes its conventional missile force from its nuclear missiles. This lattermost aspect now proves that Pakistan is more willing to conduct missile attacks in the conventional space without threatening the nuclear threshold.[56] In his Shangri La dialogue comments, ARFC Commander Gen Zakaria reaffirmed that the Force was "strictly conventional, has nothing to do with the strategic/nuclear forces of Pakistan…has a separate command and control structure, has a separate authorization chain which is completely distinct and different from the nuclear forces."

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While this also dilutes the credibility of the broader Pakistani nuclear threat (with nuclear weapons attributed a war-fighting role), it signals Pakistan's readiness for greater operations in the conventional space. Notably, between 2019 and 2026, Pakistani strategic commentary consistently attributed the creation of this expanded conventional space to India's Balakot airstrikes. By May 2026, Pakistan was explicitly espousing two linkages – that its ARFC was linked to new conventional deterrence needs vis-à-vis stand-off warfare (which Pakistan had not felt before) and that this fresh conventional deterrence need was linked to India's own conventional missile arsenal. All of this was abundantly evident in Gen Zakaria's comments – "The Indians raised these forces quite early; their rocket divisions were raised decades back. They made it part of their conventional army as a declared force (in 2021), and Pakistan had been staying its hand not to do that because of the peculiar environment of South Asia…We think that it is another unfortunate attempt by our neighbors to eviscerate strategic stability in South Asia, which has been check-mated because of what Pakistan has done. This is simply another quiver in the arsenal of deterrence stability in South Asia, ensuring conventional deterrence. (sic)"

While Pakistan has now introduced a fresh conventional/nuclear distinction in its missile force under the Army's command, meant to further operationalize Pakistan's Quid Pro Quo Plus doctrine, the military has also ensured complete control over Pakistan's nuclear force posture and operational decision-making through the creation of a separate National Strategic Command, three months after the ARFC's creation.

PAKISTAN'S MISSILE ARSENAL: REACH AND ORIGINS

Built at home, but key families trace to Chinese and North Korean designs. Range, role and assessed lineage.

SYSTEM	TYPE	RANGE (km)	ROLE	ORIGIN / ASSESSED LINEAGE
CONVENTIONAL — Army Rocket Force Command (raised 2025)				
Fatah-I	Guided MLRS	**140 km**	Conventional	Indigenous (GIDS)
Fatah-II	Ballistic	**400 km**	Conventional	Indigenous
Fatah-IV	Cruise (GLCM)	**750 km**	Conventional	Indigenous (Babur-derived)
CRUISE MISSILES — strategic delivery				
Ra'ad (Hatf-8)	Air-launched (ALCM)	**350 km**	Nuclear	Indigenous (NESCOM)
Babur-3 (Hatf-7)	Sub-launched (SLCM)	**450 km**	Nuclear	Indigenous
Babur (Hatf-7)	Ground-launched (GLCM)	**700 km**	Dual	Indigenous (assessed US Tomahawk-derived)
BALLISTIC MISSILES — nuclear-capable				
Nasr (Hatf-9)	Tactical SRBM	**70 km**	Nuclear	Indigenous
Ghaznavi (Hatf-3)	SRBM	**300 km**	Nuclear	Chinese lineage (M-11)
Abdali (Hatf-2)	SRBM	**450 km**	Nuclear	Indigenous
Shaheen-1A (Hatf-4)	SRBM	**900 km**	Nuclear	Chinese lineage (M-9)
Ghauri (Hatf-5)	MRBM (liquid)	**1,300 km**	Nuclear	N. Korean (Nodong)
Shaheen-2 (Hatf-6)	MRBM	**2,000 km**	Nuclear	Chinese lineage (M-18)
Ababeel	MRBM (MIRV)	**2,200 km**	Nuclear	Indigenous (Shaheen-based)
Shaheen-3	MRBM	**2,750 km**	Nuclear	Indigenous (solid-fuel family)

Indigenous build / design · Assessed Chinese lineage · Assessed North Korean lineage

Bar length = range; colour = role (nuclear / conventional / dual)

THE BOTTOM LINE

Pakistan **builds its missiles at home** (NESCOM, NDC, GIDS), but independent analysts trace the solid-fuel ballistic family to **Chinese** M-9/M-11/M-18 technology and the liquid-fuel Ghauri to **North Korea's Nodong**. Islamabad rejects this and calls the arsenal fully indigenous. The newest layer, the Fatah series, is home-grown.

Ranges from CSIS Missile Threat and other open sources; approximate, and the longest (Shaheen-3, Ababeel) rest on Pakistani test claims. 'Assessed lineage' is independent analysts' attribution, which Pakistan disput

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Sources: CSIS Missile Threat; NTI; FAS; Wisconsin Project; report analysis. Ranges approximate. Compiled June 2026.

NATIONAL STRATEGIC COMMAND

Among the 27th Amendment's several new creations, the National Strategic Command is the most notable. Under the amendment, the commander (rank unspecified) would be appointed by the prime minister on the army chief's recommendation and must be chosen from within the army.[57] Before this amendment, decision-making for the command, control, and force postures relating to Pakistan's nuclear arsenal was managed under the National Command Authority – an apex body comprising the PM, senior cabinet ministers (such as Defense or Foreign), the CJCSC, the Director General of the Strategic Plans Division (the executive body of the NCA), and the three service chiefs. Given other constitutional changes brought about by the 27thAmendment, the NCA has been hollowed out, as the COAS now supersedes the Air and Navy Chiefs as CDF, and the office of the CJCSC has been abolished. Since Pakistan's nuclear forces have effectively fallen within the military's ambit of control (regardless of the NCA's

civilian component), these other changes necessarily warranted a new command that institutionalizes the Army's control over Pakistan's nuclear forces, sidestepping the NCA entirely. Given that Field Marshal Munir, as CDF, is the supreme operational commander of the Pakistani military and that it is his recommended officer who will head the NSC, it can be reasonably inferred that civilian oversight over Pakistan's nuclear forces has been virtually abolished – even as the NCA continues to exist theoretically. Moreover, the supersession of the COAS over the CNS and CAS is accompanied by the NSC now theoretically subsuming each service's strategic forces command. While this would necessarily include Navy Strategic Forces Command, it is unclear how the Army would supplant the Navy's role as the "custodian of the nation's second-strike capability" (as DG-ISPR characterized it in 2012, during the Command's formation).[58]

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Notably, Pakistan did not convene the NCA during the April/May crisis with India, despite an initial announcement to do so. Pakistani officials explain this by pointing to Pakistan's faith in its conventional strength. For instance, speaking at the Center for International Strategic Studies, Islamabad, on May 28, 2025, Brig (Retd) Dr Zahir ul Haider Kazmi (Advisor Arms Control, SPD) asserted that the NCA did not convene because of "the credibility of Pakistan's conventional deterrent, anchored by the PAF and supported by precision-strike systems like the Fatah-series missiles. This was not a reactive decision; it was the expression of a deliberate and evolved doctrine."[59] While this is in line with Pakistan's historic view of nuclear weapons as warfighting tools to be used in conventional warfighting (but at the higher rungs of escalation), the dilution of the NCA's authority, months after a military clash with Pakistan's nuclear-armed neighbor, arguably points to lessons that the Pakistan military would have learned during the crisis. The NCA's non-convening in 2025, despite a higher-order escalation in that crisis, stood in sharp contrast to 2019, when Pakistan convened the body a day after India's Balakot airstrikes; that was the last time the NCA was convened.[60]

EXTERNAL PARTNERSHIPS

It is in its new defense relationships with other states where the Pakistani state, under CDF Asim Munir, has sought to leverage the April/May crisis the most. Among these is a Strategic Mutual Defense Agreement that Pakistan signed with Saudi Arabia in September 2025. While not publicly released, the SMDA was accompanied by a joint statement that did not reveal any operational details of the agreement but asserted that either state would consider an attack against the other to be an attack on itself. The non-public nature of the document is unusual amongst mutual defense agreements, which seek to deter adversaries, given that revealing the operative clauses of such a document is what lends credibility to the threat it seeks to convey. Notably, both Pakistan and Saudi Arabia faced attacks from adversarial neighbors less than a year following the signing of the SMDA (Iran and Afghanistan, respectively). While Pakistan declared open war against Afghanistan in early 2026 and Saudi Arabia suffered considerable damage to its energy infrastructure (albeit less than other Gulf states), neither state operationalized the SMDA save a few verbal invocations by Riyadh during Iran's drone and missile strikes across March. Rather, Pakistan is mediating an end to the US-Iran war, while Saudi Arabia has been mediating an end to the Afghanistan-Pakistan crisis.[61]

Hence, the Saudi-Pak SMDA is likely an agreement focused more on peacetime cooperation than on wartime commitments. Pakistan has long enjoyed a long and special relationship with Saudi Arabia. It has lent its military forces for the Kingdom's needs in both the last century (the Siege of Mecca) and the current (Riyadh's war in Yemen) – all buoyed by various agreements of cooperation and friendship.[62] As of September 2025, Saudi Arabia had witnessed the two-year-long military domination of the Middle East by a single power, Israel. However, rather than being a reaction to Israel's unprecedented strike on Doha a few weeks before the SMDA was announced, it arguably signaled Riyadh's need to capitalize on Pakistan's value as a partner to boost Saudi defense capabilities. Under Mohammad bin Salman, the Saudi state had become acutely aware of its lack of a military-industrial complex and indigenous capabilities, despite consistently ranking among the top defense spenders globally each year.

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Hence, given Pakistan's experience of manufacturing and co-producing advanced platforms with both China and Turkey, as well as Islamabad's own touting of its equipment as "combat tested", Pakistan can act as an enabler for the Saudi defense industry through advice and skill-transfer from technicians, officer training, joint partnerships between Saudi Arabia, Pakistan, and third states, among other factors.[63] Pakistan's existing "tri-party" partnerships serve as precedent, such as its new Eurasian "armored corridor," in which Pakistan is facilitating the manufacturing of Turkish-designed Cobra II and ARMA 8×8 armored vehicles at Kazakhstan's Besqaru plant, bypassing Turkish defense bureaucratic bottlenecks.[64] This can arguably occur alongside Pakistan's contractual commitments to Riyadh. For instance, by 11 April 2026, three days after a ceasefire took hold between the US and Iran (and as Saudi-UAE tensions lingered in the background), Pakistan sent about 13,000 troops and fighter jets on a deployment to KSA's King Abdulaziz Airbase in Saudi Arabia's Eastern province (bordering the UAE), in return for Saudi financial support.[65] On April 17, 2026, Riyadh provided an additional $3 billion in financial support and extended a $5 billion facility to prevent Pakistan's economic collapse (especially as ties between the UAE and Pakistan had broken down).[66]

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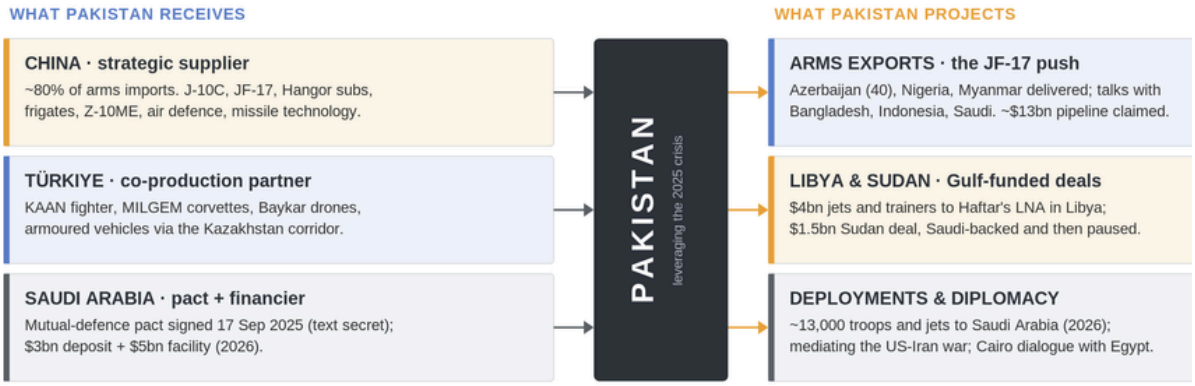
Its self-proclaimed "victory" in May has become an invariable Pakistani pitch, as evidenced by statements from both Munir and Sharif since May 2025. For instance, at the signing of the Saudi-Pak SMDA, Pakistan described the pact as one between "equal military victors"; a reference which has recurred in Munir's subsequent meetings with Saudi military leaders.[67] Similarly, at the Cairo Strategic Dialogue in October, Munir premised joint maritime security in the Red Sea on Pakistan's "combat-proven" drone and cyber capabilities.[68] Later, at the World Economic Forum in Davos, PM Sharif told international investors that Pakistan's victory in the "96-hours" had proven its resilience as a nuclear power.[69] Subsequently, by March 2026, Pakistan had cited its "success" in Operation Bunyan al Marsous to multiple states, including Azerbaijan, Nigeria, Libya, Sudan, and Bangladesh, as it sought to sell its JF-17 fighters and other platforms to them.[70] Key to several of these deals, such as a $4 billion arms deal between Pakistan and Libya's Khalifa Haftar, has been Saudi financing. KSA substantially funded the Pakistan-Libya deal (with the first batch of small arms and other equipment reaching Libya in April 2026),[71] especially due to Riyadh's desire to displace the UAE as a key influence on Haftar. However, Pakistan's dependence on Saudi financing for these deals to go through was evident when KSA withdrew its pledged funding for a potential deal between Sudan and Pakistan (even though KSA also backs the Sudanese government, while the UAE backs the renegade Rapid Support Forces).[72]

PAKISTAN'S DEFENCE PARTNERSHIPS

Armed and financed by a few key partners; now selling and deploying across the Muslim world.



THE BOTTOM LINE

Pakistan is turning its claimed May 2025 'victory' into a **web of partnerships**: armed by China, co-producing with Türkiye and bankrolled by Saudi Arabia, it is repositioning as an **arms exporter and security provider** across the Muslim world. But the export deals still **hinge on Gulf money**, and the Saudi pact's terms stay secret.

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Sources: report analysis; Al Jazeera; Reuters; Middle East Eye; Arab News; SIPRI. Figures claimed/approximate. Compiled June 2026.

CONCLUSION

The most notable shift in the Pakistan military's view of warfighting with India since the April/May crisis of 2025 is its preparations to exploit the space for conventional non-contact warfighting, which it attributes to India's creation and expansion. While Pakistani officials, academics, and strategic commentators continue to advocate the values of full-spectrum nuclear deterrence, the value of that doctrine has arguably been relegated to the background. In the foreground is Pakistan's focus on deterring non-contact warfare through significant improvements in stand-off capabilities and a willingness to use them once they mature (a scenario with far less risk than nuclear escalation).

Pakistan's preparations for more non-contact warfare with India are overtly premised on the need to mitigate the risks in the subcontinent's strategic stability created by India expanding the space for conflict. However, should Pakistan assume greater confidence in its ability to strike India more effectively with more precise and accurate missiles (along with better AD capabilities), it necessarily also implies a greater willingness to continue sponsoring the sub-conventional trigger for crises through more cross-border terrorism. The Pakistan military's abundant leveraging of its combat experience for geopolitical gains with third states only increases its incentive to trigger future crises. Pakistan's enduring need to prevent India from popularizing the functional aspects of 'de-hyphenation' and to normalize the status quo vis-à-vis Jammu and Kashmir reinforces this posture.

More importantly, the Pakistan military's increased focus on blaming India for terror attacks by both the Tehreek-e-Taliban Pakistan as well as anti-establishment attacks by Baloch militant groups (which the DG-ISPR terms 'Fitna-al-Hindustan') opens another potential trigger. For Pakistan, a significant marker of its confidence and quest to balance its geopolitical status with India would be to replicate India's own characterization of viewing a terror attack as the first rung on the escalation ladder. There are only two limitations to this possibility – unlike India, Pakistan does not have any non-state target on Indian territory that it can strike and still retain escalation control, and Pakistan's adoption of India's strategy undermines its own advocacy against India's normalization of conventional action following sub-conventional triggers. To overcome both limitations, the Pakistan military will arguably have to await the maturation of its military capabilities, which can truly 'out-match' India. Ultimately, given Pakistan's irredentist regional posture, it is capability rather than intent that poses the most potent obstacle to proactive conventional adventurism, beyond generating sub-conventional triggers for conflict.

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