

Operation Sindoor and the Ratchet Effect: Why the South Asian Nuclear Flashpoint Is Structurally More Dangerous Than Before

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Abstract

This paper examines Operation Sindoor as the product of four interlocking structural conditions: the contested origins of the Pahalgam attack; Hindutva ideology's foreclosure of diplomatic resolution; National Security Adviser (NSA) Ajit Doval's 'defensive offence' doctrine; and India's accelerating isolation in a multipolar order in which Pakistan has emerged as an indispensable regional mediator. Utilising open-source intelligence, official government statements and communiqués, think-tank assessments from the Stimson Center, Harvard's Belfer Center, and RSIS Singapore, peer-reviewed scholarship on Hindutva nationalism, and reporting from Foreign Affairs, The Diplomat, The Intercept, and The Jerusalem Post, the analysis finds that Operation Sindoor failed to achieve its strategic objectives. Elizabeth Threlkeld (Stimson Center/Foreign Affairs, 2026) identifies a 'ratchet effect': each confrontation resets the escalation baseline upward with no improvement in crisis-management architecture, making the next crisis structurally more dangerous. The paper contributes the ratchet effect framework to Pakistani strategic studies, analyses deterrence postures symmetrically, and identifies concrete policy steps to convert Pakistan's current diplomatic standing into durable crisis-management architecture.

Keywords: *Operation Sindoor · India-Pakistan conflict · Hindutva · Kashmir · nuclear escalation · Indus Waters Treaty · ratchet effect · full-spectrum deterrence*

1. Introduction

On the night of 7-8 May 2025, India carried out its most significant military action since 1971 by engaging nine targets inside Pakistan. India codenamed its action as 'Operation Sindoor', and the official discourse presented it as a retaliatory response for the Pahalgam attack in Indian Illegally Occupied Jammu and Kashmir (IIOJK) that claimed the lives of twenty-six individuals. Without any evidence or adjudication, India became the accuser and declared that Pakistan was responsible for the terrorist attack in Pahalgam. However, this accusation and the subsequent action only address the immediate symptom while conflating it with the underlying systemic flaw.

Pakistan responded with its counterstrike, 'Operation Bunyan-um-Marsoos', and the ceasefire came into effect after four days, with both governments alluding to vindication. More than a year has elapsed, and the Western strategic

institutions and think tanks now assess that the crisis was never successfully managed either by the adversaries or by the international powers; there is more risk of recurrence of such an event in the future, which will be more severe and serious, having the potential to spiral beyond restraint. This paper addresses the same phenomenon that has been identified by the Stimson Center, Harvard's Belfer Center, *The Diplomat*, etc that despite the restraint and capability claimed by the two neighbouring countries during the crisis, the region is structurally closer to an outbreak of another crisis that would commence from the same endpoint and escalate further and may even cross the nuclear threshold.

Elizabeth Threlkeld's analysis of the crisis, discussed in the paper, is written from the US foreign policy vantage and does not examine the domestic Indian drivers that led India to carry out its strikes in May 2025. Likewise, the Pakistani commentary on the attribution of the Pahalgam attack, effects of a radical Hindutva-driven foreign policy, and Pakistan's diplomatic realignment has either treated the subjects separately, without integrating them or drawing parallels between them. Moreover, no current accounts examining Operation Sindoor have been able to explain or integrate the contested origins of the triggering point of the crisis, why the situation escalated quickly, or the ideological structure dominated by stubborn beliefs that eluded any diplomatic rapprochement, military doctrines that culminated in strikes and counterstrikes, or the diplomatic environment where the escalation baseline moved further to a nuclear threshold. A deliberate effort has been made to integrate all the above through this paper.

This paper therefore asks: what structural conditions, operating in conjunction rather than in isolation, account for the post-Sindoor ratchet effect, and what does a symmetric analysis of both states' deterrence postures suggest about the trajectory of the next crisis? The paper argues that Operation Sindoor is not an isolated response to a terrorist incident but a calculated military response materialising from four interlocking structural conditions since 2014: the unresolved Kashmir issue and its political instrumentalisation; the alignment of Indian foreign policy with Hindutva philosophy which eludes any diplomatic resolution; the Doval Doctrine and its consequences; and India's misalignment with a multipolar world where Pakistan has emerged as a regional mediator. Elizabeth Threlkeld, Senior Fellow and Director of the South Asia Programme at the Stimson Center, writing in *Foreign Affairs* (May 2026)¹, supplies the paper's organising framework, whereby each successive confrontation between Pakistan and India resets the baseline for manageable escalation upwards, which has now become difficult to manage with the current crisis-management architecture. Each condition below is examined as a mechanism contributing to that ratchet, not as an independent topic.

¹Elizabeth Threlkeld, "Why the Next India-Pakistan War Will Escalate: And Why America Will Struggle to Contain It," *Foreign Affairs*, May 4, 2026, <https://www.foreignaffairs.com/india/why-next-india-pakistan-war-will-escalate>.

Section 2 gives the methodology, sourcing and analytical limitations and Section 3 through Section 6 examine the structural conditions as highlighted above. Section 7 conducts a brief symmetric deterrence analysis and Section 8 concludes with policy recommendations.

2. Methodology

This paper is a qualitative, document-based analysis and synthesises four categories of source: open-source intelligence and reporting; official government statements and communiqués; think-tank assessments from the Stimson Center, Harvard's Belfer Center, RSIS Singapore, and the Carnegie Endowment; and peer-reviewed scholarship on Hindutva nationalism, alongside reporting from *Foreign Affairs*, *The Diplomat*, *The Intercept*, and *The Jerusalem Post*. Sources are weighted hierarchically: primary legal and governmental records – the PCA award in Case No. 2023-01, the US Congressional Research Service assessment, Election Commission of India results, and US Department of Justice filings – are treated as load-bearing. Peer-reviewed and think-tank sources are treated as corroborating and are cross-checked against each other before a claim is presented as established. Journalistic and single-analyst sources are used only where corroborated by at least one source from the two preceding categories; however, where a claim rests on a single uncorroborated source, this is stated explicitly rather than left implicit.

The analysis is conducted from a Pakistani analytical vantage point, which the author states openly rather than leaving implicit. A separate methodological constraint applies to any researcher working outside Indian state institutions: primary access to Indian military operational records and classified assessments is unavailable. Where military outcomes are contested between the two states – aircraft losses in particular – this paper reports claimed figures as claimed and independently corroborated figures as corroborated; it does not adjudicate between them where no independent verification exists.

The analysis covers a single case observed over a one-year post-crisis window; the ratchet-effect framework has been adopted from Threlkeld's comparative analysis, and the paper's contribution is its application and extension to Pakistani strategic studies and symmetric deterrence analysis. Since the paper argues from Pakistani vantage point, Section 7 applies a symmetric-analysis discipline: Pakistan's own full-spectrum deterrence doctrine is subjected to the same critical scrutiny, sourced to the Carnegie Endowment and the Arms Control Association, that is applied to India's doctrine and conduct throughout Sections 3 through 6.

3. The Pahalgam Attack and the Question of Attribution

The first structural condition is the unresolved status of Kashmir and the contested manner in which the Pahalgam attack was converted into justification for cross-border strikes. Where attribution is asserted rather than established, and a decades-old dispute supplies a ready cause for punitive action, the threshold for what counts as sufficient provocation is lowered – for this crisis and for the next one.

3.1 The Pattern of Pretext

On 22 April 2025, gunmen entered the Baisaran meadow near Pahalgam and killed twenty-six civilians, reportedly separating victims by religion. Within hours of the incident, India laid blame on Lashkar-e-Taiba and announced retaliatory measures the following day, before conducting any independent investigation of the incident. The measures included suspension of the Indus Waters Treaty (IWT) 1960, shutting down the Wagah-Attari border, banning all imports, invalidating Pakistani visas, and downgrading diplomatic staff at the high commission.²

Pakistan denied any involvement and proposed an international investigation, which was rejected. One year later, Pakistan's Information Minister confirmed 'India had provided neither solid proof nor satisfactory explanations.' Multiple Pakistani and independent media reports highlighted that a First Information Report (FIR) was registered within a remarkably short interval after the attack, implying prior preparation, yet this remains independently unverified by any neutral judicial body.³

The similarity of Pahalgam with the Pulwama attack of February 2019 is intriguing. Former IIOJK Governor Satya Pal Malik revealed that Central Reserve Police Force (CRPF) personnel had requested aircraft transport that was denied by the Union Home Ministry, and that Prime Minister Modi and NSA Ajit Doval instructed him to remain silent about the security lapse.⁴ Both attacks occurred

²Khalid Mehmood, "One Year On, India Failed to Present Evidence on Pahalgam Attack: Tarar," *The Express Tribune*, April 22, 2026, <https://tribune.com.pk/story/2604126>; Associated Press of Pakistan, "No Evidence After One Year: Tarar Slams India Over Pahalgam False Flag Operation," *Aaj News*, April 22, 2026, <https://english.aaj.tv/news/330457304/>.

³News Desk, "'False Flag' Operation? Pahalgam FIR Highlights Loopholes in Indian Narrative," *The Express Tribune*, April 25, 2025, <https://tribune.com.pk/story/2542235/false-flag-operation-pahalgam-fir-highlights-loopholes-in-indian-narrative>.

⁴Scroll Staff, "Narendra Modi Told Me to Stay Silent About Lapses That Led to Pulwama Attack, Claims Ex-J&K Governor," *Scroll.in*, April 15, 2023, <https://scroll.in/latest/1047394/>; Abid Hussain, "Pakistan Reacts to Ex-Kashmir

during BJP rule, no evidence was brought forward yet Pakistan was blamed, resorted to military action, BJP accumulated electoral benefit, and were followed by demands for independent investigation that were rejected outright.

3.2 Kashmir as Political Resource

The broader pattern is structural rather than coincidental. The legal status of IIOJK remains, under international law, a matter of unimplemented UN Security Council resolutions. The revocation of Articles 370 and 35A in August 2019, stripping the territory of its constitutional autonomy and opening it to non-Kashmiri settlements, deepened the dispute rather than resolving it, while simultaneously entrenching the BJP's political dependence on the conflict as a mobilisation mechanism.⁵

The administrative consequences extended beyond the revocation of autonomy. India's simultaneous bifurcation of the former state into two Union Territories (UT) – Jammu and Kashmir, which retains a legislature, and Ladakh, which does not – deepened the entrenchment of direct central control in structurally distinct ways. Removing Ladakh from any future settlement framework complicates even a hypothetical restoration of pre-2019 arrangements, requiring a separate legislative act of Parliament. The security logic underpinning the split is transparent: Ladakh's strategic border position with both Pakistan and China made its administrative separation from the Kashmir political question a priority for Indian defence planning. Buddhist communities in Ladakh initially welcomed the change but later protested, demanding statehood and Sixth Schedule inclusion when it became clear that Ladakh UT had been granted neither legislature nor elected representation.⁶

This seems more like a structural incentive than a policy choice where a ruling coalition based on Hindutva mobilisation requires pacification of its

Governor's Revelations on Pulwama," *Al Jazeera*, April 17, 2023, <https://www.aljazeera.com/news/2023/4/17/pakistan-reacts-to-ex-kashmir-governors-revelations-on-pulwama>.

⁵Hijab Shah and Melissa Dalton, "Indian Revocation of Kashmir's Special Status," Center for Strategic and International Studies, August 12, 2019, <https://www.csis.org/analysis/indian-revocation-kashmirs-special-status>; Sumantra Bose, *Kashmir: Roots of Conflict, Paths to Peace* (Cambridge, MA: Harvard University Press, 2003).

⁶On Buddhist communities' initial welcome and subsequent protests demanding statehood and Sixth Schedule inclusion, see the Leh Apex Body and Kargil Democratic Alliance joint statements, 2021–2024, as reported in Naseer Ganai, "Ladakh Bodies Seek Statehood, Inclusion in Sixth Schedule," *The Tribune* (Chandigarh), February 26, 2024, <https://www.tribuneindia.com/news/j-k/ladakh-bodies-seek-statehood-inclusion-in-sixth-schedule-594522>.

followers, and the only way to do this is to target the minority Muslims at home and show strength against a Muslim neighbour while portraying both as enemies. Under such an overhang, any resolution of the Kashmir dispute is neither viable nor tenable for the BJP.

4. The Conduct and Consequences of Operation Sindoor

This section briefly explains the crisis. The strategic lessons both the states drew from the conflict are examined in Subsection 4.3, highlighting what converts a single confrontation into a ratchet – when both sides are convinced of their capability as well as restraint, the conflict does not deter recurrence but rather rehearses it.

4.1 *Four Days in May*⁷

In the early hours of 7 May 2025, between 1:05 and 1:30 a.m., the Indian Air Force struck nine targets, including civilian targets at Bahawalpur and Muridke.⁸ Since the 1971 war, this was the first time that strikes were carried out across the international border. In 2019, the strikes at Balakot were carried out by India in a disputed territory but this time it was an act of war against a sovereign territory.

Pakistan's response – Operation Bunyan-um-Marsoos – entailed air and missile strikes against Indian military installations including those at Udampur, Pathankot, and Adampur. According to Hermes-Kalamos analyst Daniel Martín Menjón, the aerial engagement that followed was the most extensive air battle since the Second World War, fought beyond visual range and involving over 100 aircraft across multiple engagement envelopes. Pakistan claimed the destruction of five Indian aircraft – three Rafales, one MiG-29, and one Su-30 MKI. India's Chief of Defence Staff declined to confirm or deny.⁹ A Congressional Research Service

⁷Christopher Clary, "Four Days in May: The India-Pakistan Crisis of 2025," Stimson Center, May 28, 2025, <https://www.stimson.org/2025/four-days-in-may-the-india-pakistan-crisis-of-2025/>.

⁸Rudra Chaudhuri, "Indian Airstrikes in Pakistan: May 7, 2025," Carnegie Endowment for International Peace, May 7, 2025, <https://carnegieendowment.org/posts/2025/05/indian-airstrikes-in-pakistan-may-7-2025>.

⁹Daniel Martín Menjón, "The Evolution of Beyond Visual Range Air Combat in South Asia: A Multidimensional Analysis of Operation Sindoor (2025) and Its Global Strategic Implications," *Hermes Kalamos*, October 28, 2025, <https://www.hermes-kalamos.eu/the-evolution-of-beyond-visual-range-air-combat-in-south-asia-a-multidimensional-analysis-of-operation-sindoor-2025-and-its-global-strategic-implications/>; Aurangzeb Ahmad, "LIVE: Air Force Officer Aurangzeb Ahmad Briefing To Media | Indian Rafael Destroyed | Pak India War," posted by Public News, May 12, 2025, YouTube video, https://www.youtube.com/watch?v=BA_RF5ihkiM; Aurangzeb Ahmad, "PAF VS

assessment noted that Pakistan's aerial performance demonstrated the operational effectiveness of its Chinese-supplied air defence systems.

The ceasefire between the two rivals came into effect on 10 May. President Trump claimed credit for brokering peace between the two countries, yet India denied any third-party mediation. Trump's repeated assertions about stopping the war between India and Pakistan made a considerable dent in India's international standing post-Sindoor.

4.2 Strategic Outcomes: The Gap Between Claim and Reality

On the first anniversary of the Pahalgam attack, the Indian Army published messaging declaring 'Operation Sindoor continues...', framing the ceasefire as a pause rather than a resolution.¹⁰ Indian defence analyst Praveen Sawhney believes that India had achieved none of its declared objectives: the proxy war in Kashmir remained unresolved, Pakistan's deterrence was not degraded, and India had inadvertently boosted China's global profile as a reliable security partner.¹¹

Operation Sindoor failed to produce any strategic gains – resolution of the underlying dispute, degradation of Pakistan's military capability, restoration of diplomatic channels and improvement in India's international standing. The Pahalgam attack remains uninvestigated by any independent body, the IWT suspension was ruled unlawful by the Permanent Court of Arbitration (PCA), the ceasefire was externally brokered, and India's parliamentary delegations failed to secure meetings with senior officials in over thirty countries in the conflict's aftermath.

4.3 The Ratchet Effect: Convergent Warnings

Elizabeth Threlkeld's article contends that India and Pakistan have drawn the wrong lesson from the four-day conflict: that intense conventional fighting can be conducted without triggering nuclear use. Each side emerged more determined

IAF | How PAF Caused Massive Destruction in India? | Air Vice Marshal Aurangzeb Ahmed Reveal," posted by Express News, May 11, 2025, YouTube video, <https://www.youtube.com/watch?v=ok9S5xZN81A>; K. Alan Kronstadt, *India-Pakistan Conflict in Spring 2025*, CRS In Focus IF13000 (Washington, DC: Congressional Research Service, May 13, 2025), <https://www.congress.gov/crs-product/IF13000>.

¹⁰Oneindia Desk, "For Acts Against India, Response Is Assured: Indian Army On Pahalgam Attack Anniversary," *Oneindia*, April 22, 2026, <https://www.oneindia.com/india/for-acts-against-india-response-is-assured-indian-army-on-pahalgam-attack-anniversary-011-8065717.html>.

¹¹Pravin Sawhney, "Operation Sindoor: How India's Gamble Backfired and Made It More Vulnerable," *The Wire*, June 8, 2025, <https://thewire.in/security/operation-sindoor-how-indias-gamble-backfired-and-made-it-more-vulnerable>.

to exact costs on the battlefield and more confident in their ability to do so. The structural consequence is a ratchet effect whereby each crisis resets the threshold for manageable escalation upwards while the crisis-management architecture remains static. Swasti Sachdeva of *The Diplomat*, in May 2026, reached the same conclusion: the next crisis will unfold faster, under heavier domestic pressure on both governments, with fewer external brakes – and with the settled belief within both national security establishments that escalation can be controlled.¹² That conviction is not a stabilising factor and the single most dangerous legacy of 2025.

5. The Ideological Driver: Hindutva, the Doval Doctrine, and the India-Israel Axis

The second and third structural conditions are addressed together in this section. The Hindutva ideology that eludes any diplomatic resolution of the underlying dispute and the Doval Doctrine that weaponised the ideological posture into an operational offensive doctrine, elucidate why de-escalation architecture after Pahalgam was not possible, and why it would not be possible in another crisis.

5.1 When Ideology Becomes Foreign Policy

The structural conditions that produced Operation Sindoor cannot be understood without accounting for the ideological transformation of Indian statecraft since 2014. Professor Rajesh Basrur of S. Rajaratnam School of International Studies (RSIS) Singapore locates the foundational problem in Hindutva itself: because the ideology supplies the BJP's entire lens on the world, the party has never developed a foreign policy distinct from it.¹³ Chris Ogden of the Hoover Institution has coined the term 'Hinduization of foreign policy' to describe the progressive subordination of India's external relations to Hindutva's domestic political requirements.¹⁴

For Hindutva to gain traction, it requires Muslim otherness as a constitutive condition; without internal and external Muslim threats, the BJP's mobilisation logic collapses. Kissinger's warning, written in 1968 but prescient for the present

¹²Threlkeld, "Why the Next India-Pakistan War Will Escalate"; Swasti Sachdeva, "A Year After Operation Sindoor: Rising Risks and Deepening Instability," *The Diplomat*, May 6, 2026, <https://thediplomat.com/2026/05/a-year-after-operation-sindoor-rising-risks-and-deepening-instability/>.

¹³Rajesh Basrur, "Hindutva and India's Foreign Policy," RSIS Policy Paper IP23033 (Singapore: S. Rajaratnam School of International Studies, March 30, 2023), <https://rsis.edu.sg/rsis-publication/idss/ip23033-hindutva-and-indias-foreign-policy/>.

¹⁴Chris Ogden, "A Focused and Dynamic Foreign Policy for India," in *The Hoover Institution's Survey of India*, ed. Sumit Ganguly and Dinsha Mistree (Stanford, CA: Hoover Institution Press, 2025), 69, <https://www.hoover.org/research/hoover-institutions-survey-india>.

moment, applies with precision: ‘the greatest need of the contemporary international system is an agreed concept of order’ – in its absence, ideology and nationalism deepen international schisms.¹⁵ The point to ponder is, how can one expect worthwhile diplomacy from the BJP government that has infused its foreign policy with Hindutva.

However, BJP’s loss of its outright parliamentary majority in the Indian general elections in June 2024 suggests that the Hindutva project does not command the settled electoral consent its media apparatus implies, though institutional capture of the judiciary, bureaucracy, and education system runs deep enough that reversal would require sustained effort across multiple electoral cycles.¹⁶

5.2 The Doval Doctrine and R&AW’s Offensive Posture

India’s National Security Adviser Ajit Doval articulated his strategic doctrine at Sastra University, Tamil Nadu, in February 2014:

‘Pakistan’s vulnerability is many, many times higher than India’s. Once they know India has shifted to defensive offence, they will find it is unaffordable for them. You can do one Mumbai, you may lose Balochistan. There is no nuclear war involved in that.’¹⁷

This was a precise articulation of a doctrine of covert destabilisation – exploiting Pakistan’s internal fault lines through subversion, support for separatist movements, and the calibrated employment of non-state actors as instruments of state policy. The doctrine has been operationalised.

In the Canada–US theatre: in June 2023, Hardeep Singh Nijjar was killed outside a gurdwara in Surrey, Canada; Canadian Prime Minister Trudeau publicly linked Indian intelligence to the killing. A US Department of Justice indictment revealed that an Indian government official had sought to arrange the assassination

¹⁵Henry A. Kissinger, "Central Issues of American Foreign Policy," in *Foreign Relations of the United States, 1969–1976*, vol. 1, *Foundations of Foreign Policy*, doc. 4 (Washington, DC: Government Printing Office, 2003), <https://history.state.gov/historicaldocuments/frus1969-76v01/d4>.

¹⁶Election Commission of India, *General Election Results, June 2024* (New Delhi: ECI, 2024). NDA: 293 seats; BJP alone: 240 seats (below the 272 required for majority); INDIA bloc: 234 seats.

¹⁷Ajit Kumar Doval, address at SASTRA University, Thanjavur, Tamil Nadu, February 2014, video, 1:15:20, available on Dailymotion, posted by “Ajit Doval’s Speech at SASTRA University,” <https://www.dailymotion.com/video/x2njwui>, corroborated by the Institute for Defence Studies and Analyses (IDSA); see also Naveed Hussain, “Doval Doctrine: India’s Trail of Terror,” *The Express Tribune*, July 6, 2025, <https://tribune.com.pk/story/2554437/doval-doctrine-indias-trail-of-terror>.

of US citizen Gurpatwant Singh Pannun; co-conspirator Nikhil Gupta pleaded guilty in a US federal court in February 2026. Intelligence documents leaked to *The Intercept* document R&AW's planning of assassinations targeting Sikh and Kashmiri activists abroad using local criminal networks.¹⁸

In the Pakistan theatre, the documented programme is broader and more sustained. Amir Sarfaraz was killed in Lahore in April 2023; Paramjit Singh Panjwar was killed in Lahore in May 2023. *The Washington Post* and *The Guardian* have both reported on a wider programme of India-linked targeted killings inside Pakistan. Across both theatres, the operational pattern – motorcycle-borne shooters, prior surveillance, pre-designation of targets as terrorists – bears structural resemblance to Israel's Mossad *kidon* methodology.¹⁹

5.3 The India–Israel Intelligence Axis

The R&AW-Mossad operational parallel has been examined by analysts at the India-Israel intersection. Paushali Lass, writing in *The Jerusalem Post*, has argued that Operation Sindoor reflected a targeting and precision-strike doctrine Israel has refined over decades. Since India faces a nuclear-armed adversary, it utilised the Israeli model for a conceptual framework only.²⁰ Modi's state visit to

¹⁸Murtaza Hussain and Ryan Grim, "Secret Intelligence Documents Show Global Reach of India's Death Squads," *The Intercept*, November 21, 2023, <https://theintercept.com/2023/11/21/india-assassinations-sikh-pakistan/>; U.S. Department of Justice, U.S. Attorney's Office, Southern District of New York, "Indian National Pleads Guilty To Plotting To Assassinate U.S. Citizen In New York City," press release, February 13, 2026, <https://www.justice.gov/usao-sdny/pr/indian-national-pleads-guilty-plotting-assassinate-us-citizen-new-york-city>; Omar Ahmed, "Has India Taken a Leaf Out of Mossad's Assassination Handbook?," *Middle East Monitor*, October 2, 2023, <https://www.middleeastmonitor.com/20231002-has-india-taken-a-leaf-out-of-mossads-assassination-handbook/>.

¹⁹Amir Sarfaraz was killed in Lahore in April 2023; Paramjit Singh Panjwar was killed in Lahore in May 2023; see also Hannah Ellis-Petersen, Aakash Hassan, and Shah Meer Baloch, "How India's Government Targets Its Enemies Abroad," *The Guardian*, April 4, 2024, <https://www.theguardian.com/world/2024/apr/04/india-government-targets-enemies-abroad-raw-pakistan-killings>; Souad Mekhennet et al., "In India's Shadow War with Pakistan, a Campaign of Targeted Killings," *The Washington Post*, December 31, 2024, <https://www.washingtonpost.com/world/2024/12/31/india-pakistan-targeted-killings-assassinations/>.

²⁰Paushali Lass, "Pahalgam to Operation Sindoor: The India-Israel Counterterrorism Alliance," *The Jerusalem Post*, May 7, 2026, <https://www.jpost.com/defense-and-tech/article-895432>.

Israel in February 2026 was not out of the blue and the defence cooperation entails intelligence-sharing arrangements.²¹

6. Diplomatic Isolation and Pakistan's Strategic Ascent

The fourth structural condition is the diplomatic environment in which Operation Sindoor was conducted and received. India's diplomatic isolation, along with Pakistan's emergence as a credible regional mediator, weakens one of the external checks that could discipline any escalatory behaviour in future crises. The ratchet effect will occur with fewer international pressures, as it did in 2019.

6.1 India's Isolation in a Multipolar World

Israel was the only country that stood by India during Operation Sindoor. Interestingly, its strategic ally Russia adopted silence. India's much-hyped all-party parliamentary delegations despatched to over 30 countries to garner support achieved little. It was a rude awakening since the Indian grand policy was aligned to a unipolar world and over-reliant on its Quad membership, where the US sets the terms and India follows instinctively as a regional counterweight.

Meanwhile, China, Turkey and Azerbaijan supported Pakistan. India's ideological alignment with Israel when the Global South was increasingly voicing concerns regarding Israeli atrocities in Gaza has been instrumental in its isolation. In 2024, Jaishankar had said that nationalist diplomacy was simply something the world would have to accommodate. Eighteen months later, the world had done no such thing. It had moved on without India.

6.2 Pakistan's Diplomatic Renaissance

From the embers of the Indo-Pak conflict in 2025, where Pakistan was once looked down upon as a regional liability, it emerged as an indispensable mediator. Playing host and mediator to US and Iranian delegations in Islamabad on 11–12 April 2026 was Pakistan's own initiative that demonstrated trust by both parties. Iranian Ambassador Moghadam's statement, "talks in Pakistan and nowhere else, because we trust Pakistan", reflected confidence in Pakistan.²² Following Operation Sindoor, Pakistan held the UN Security Council presidency, sought BRICS

²¹Lauren Dagan Amoss, "One Year After Pahalgam, Operation Sindoor Recasts Israel's Strategic Value for India," *The Jerusalem Post*, April 29, 2026, <https://www.jpost.com/defense-and-tech/article-894530>; Paushali Lass and Lauren Dagan Amoss, "Beyond Defense: How Human Connections Will Shape India-Israel Relations," *The Jerusalem Post*, April 6, 2026, <https://www.jpost.com/defense-and-tech/article-892188>.

²²Farzana Shaikh, "What Does Pakistan Gain from Its Iran-US Diplomacy?," Chatham House, April 21, 2026, <https://www.chathamhouse.org/2026/04/what-does-pakistan-gain-its-iran-us-diplomacy>.

membership with Russian backing, hosted the SCO summit, and concluded a strategic defence agreement with Saudi Arabia.

The Stimson Center describes Pakistan as a paradox, "ascendant abroad, unsettled within".²³

6.3 Water as a Weapon and the PCA Ruling

By suspending IWT on 23 April 2025, India resorted to using water as a weapon. This aspect of Operation Sindoor did not attract much international scrutiny. The treaty had survived three wars but was suspended with barely four hours' notice. Flows at Marala Headworks were throttled to 8,000 cusecs, then abruptly released at over 55,000 cusecs on 3 May – overwhelming downstream canals and destroying standing crops – then throttled again to below 4,000 cusecs by 6 May.²⁴ On 8 August 2025, the PCA ruled in Case No. 2023-01 that India had no legal right to suspend the treaty unilaterally and directed restoration of uninterrupted flows.²⁵ World Bank President Ajay Banga confirmed that no provision in the treaty permits unilateral suspension. India's disregard of a binding international ruling represents the long-term consequence of ideology-driven statecraft.

7. Deterrence Calculus: A Symmetric Analysis

This section conducts a brief symmetric deterrence analysis of both the countries, applying the same analytical standard as in section 2.

7.1 Pakistan's Full-Spectrum Deterrence Doctrine

Pakistan's response to India's conventional superiority has been the development of a 'full-spectrum deterrence' (FSD) doctrine, operationalised through the Nasr (Hatf-IX) tactical nuclear weapon system – a short-range ballistic

²³Ali Mustafa and Sameer Ali Khan, "Pakistan in 2025: Ascendant Abroad, Unsettled Within," *South Asian Voices*, December 26, 2025, <https://southasianvoices.org/pol-co-pk-r-2025-pakistan-12-26-2025/>.

²⁴Arshad H. Abbasi, "Water Weaponisation and the Indus Crisis: A Treaty Broken, a Region at Risk," *The Friday Times*, January 7, 2026, <https://www.thefridaytimes.com/07-Jan-2026/water-weaponisation-indus-crisis-treaty-broken-region-risk>; Betsy Joles, "With Indus Waters Treaty in the Balance, Pakistan Braces for More Water Woes," *NPR*, July 8, 2025, <https://www.npr.org/2025/07/08/g-s1-73122/pakistan-india-indus-waters-treaty>.

²⁵Permanent Court of Arbitration, *The Indus Waters Western Rivers Arbitration (Islamic Republic of Pakistan v. Republic of India)*, Case No. 2023-01, Award on Issues of General Interpretation of the Indus Waters Treaty, August 8, 2025 (The Hague: PCA, 2025), <https://pca-cpa.org/en/news/pca-press-release-pca-case-no-2023-01-the-indus-waters-western-rivers-arbitration-islamic-republic-of-pakistan-v-republic-of-india/>.

missile designed to deliver low-yield nuclear warheads against advancing Indian armoured formations, explicitly designed to close the space for India's Cold Start doctrine.²⁶ FSD compresses the nuclear threshold in a structurally distinct way: by extending nuclear deterrence to the battlefield level, Pakistan reduces the margin between conventional and nuclear conflict to a matter of tactical decision. Critics at the Carnegie Endowment and the Arms Control Association have argued that deploying battlefield nuclear systems creates 'use-it-or-lose-it' pressures, potentially undermining deterrence stability rather than reinforcing it. A symmetric analysis demands that this tension be acknowledged: Pakistan's deterrence architecture, while a rational response to conventional asymmetry, carries its own escalation risks that the ratchet effect will amplify in any future crisis.²⁷ The National Interest observed that Pakistan has moved well beyond doctrinal declaration – combining airpower, precision missiles, drones, and information operations into an integrated, multi-domain operational approach that the 2025 crisis road-tested under live conditions.²⁸

7.2 India's No-First-Use Doctrine and Its Ambiguities

There is considerable ambiguity with regard to the Indian nuclear doctrine of No First Use (NFU). In November 2016, the then Indian Defence Minister Manohar Parrikar questioned its value, since the 2003 nuclear doctrine specifically states nuclear retaliation in response to attacks with chemical or biological weapons.²⁹ The drone and missile strike at Nur Khan airbase signalled India's

²⁶Sadia Tasleem, "Pakistan's Nuclear Use Doctrine," Carnegie Endowment for International Peace, June 30, 2016,

<https://carnegieendowment.org/research/2016/06/pakistans-nuclear-use-doctrine>; Jaganath Sankaran, "The Enduring Power of Bad Ideas: 'Cold Start' and Battlefield Nuclear Weapons in South Asia," *Arms Control Today*, November 2014, <https://www.armscontrol.org/act/2014-11/features/enduring-power-bad-ideas-cold-start-and-battlefield-nuclear-weapons-south-asia>.

²⁷Tasleem, "Pakistan's Nuclear Use Doctrine"; Sankaran, "Enduring Power of Bad Ideas"; Mansoor Ahmed, "Pakistan's Tactical Nuclear Weapons and Their Impact on Stability," Carnegie Endowment for International Peace, June 30, 2016, <https://carnegieendowment.org/research/2016/06/pakistans-tactical-nuclear-weapons-and-their-impact-on-stability>.

²⁸Afeera Firdous, Sahar Khan, and Haleema Saadia, "What the 2025 India-Pakistan Conflict Revealed about Modern Warfare," *The National Interest*, May 28, 2026, <https://nationalinterest.org/blog/silk-road-rivalries/what-the-2025-india-pakistan-conflict-revealed-about-modern-warfare>.

²⁹"Why Bind Ourselves to 'No First Use Policy', Says Parrikar on India's Nuke Doctrine," *The Hindu*, December 4, 2021 (republishing of report originally published November 10, 2016),

<https://www.thehindu.com/news/national/Manohar-Parrikar-on-%E2%80%99no-first-use-policy%E2%80%99-on-India%E2%80%99s-nuke->

capacity and willingness to increase the dimensions of conflict. It also indicated that India has the wherewithal to threaten the nearby Pakistan's National Command Authority infrastructure.³⁰ The subsequent establishment of Army Rocket Force Command indicates that Pakistan is willing to undergo posture adjustments.³¹

8. Conclusion: The Ratchet, the Risk, and What Needs to Change

Operation Sindoor ended in a stalemate yet both sides claim themselves as victors. India perceives that it has the capacity to carry out strikes in Pakistani territory while remaining well below the nuclear threshold. Pakistan perceives that its Chinese-supplied systems could extract a genuine cost from the Indian Air Force. A conflict in which both protagonists conclude they performed creditably is not a conflict that deters the next one, rather it is a conflict that rehearses it.³² The next crisis will not begin from zero but from a higher starting point, with compressed timelines, greater domestic pressure, and the settled conviction on both sides that escalation can be controlled. Harvard's Belfer Center noted that India's strikes near Pakistan's nuclear command infrastructure took the region perilously close to a threshold that neither side explicitly defines or publicises.³³

A multinational study published in the *Proceedings of the National Academy of Sciences* established that even a limited nuclear exchange would launch

[doctrine/article60615213.ece](#); "India's Defense Minister Questions Its No First-Use Nuclear Policy – Then Says It's His Personal Opinion," *The Washington Post*, November 10, 2016,

<https://www.washingtonpost.com/news/worldviews/wp/2016/11/10/indias-defense-minister-questions-its-no-first-use-nuclear-policy-then-says-its-his-personal-opinion/>; Ankit Panda, "From 'No First Use' to 'No, First Use?'," *The Diplomat*, August 18, 2019, <https://thediplomat.com/2019/08/from-no-first-use-to-no-first-use/>.

³⁰Rabia Akhtar, "Escalation Gone Meta: Strategic Lessons from the 2025 India-Pakistan Crisis," Belfer Center for Science and International Affairs, May 14, 2025, <https://www.belfercenter.org/research-analysis/escalation-gone-meta-strategic-lessons-2025-india-pakistan-crisis>.

³¹Baqir Sajjad Syed, "New 'Rocket Force' to Bolster Strike Capability," *Dawn*, August 15, 2025, <https://www.dawn.com/news/1930990>; Muhammad Naveed Qaisar, "Pakistan's New Rocket Force: Strategic Deterrence and Escalation Risks," *South Asian Voices*, September 30, 2025, <https://southasianvoices.org/sec-m-pk-n-pakistan-rocket-force-09-30-2025/>.

³²Robert Farley, "India And Pakistan Both Think They Won 'Operation Sindoor' – That's The Problem," *19FortyFive*, January 27, 2026, <https://www.19fortyfive.com/2026/01/india-and-pakistan-both-think-they-won-operation-sindoor-thats-the-problem/>; Akhtar, "Escalation Gone Meta"; Threlkeld, "Why the Next India-Pakistan War Will Escalate."

³³Akhtar, "Escalation Gone Meta."

five million tons of soot into the stratosphere, depress global mean temperatures by 1.8°C for five years, and reduce global cereal production by eleven percent, affecting an estimated two billion people.³⁴ British American Security Information Council (BASIC) has identified AI-enabled decision-support systems on both sides as compressing escalation timelines further, reducing the time available for political leaders to intervene before military logic takes over.³⁵

8.1 Policy Recommendations for Pakistan

Pakistan's unprecedented international standing should be converted into concrete proposals before the diplomatic window narrows. Following is recommended for Pakistan:

- Table a formal proposal for bilateral crisis communication protocols with India, including standing hotlines between NSA offices and a jointly agreed definition of 'nuclear signalling acts' – such as strikes within a defined radius of nuclear command infrastructure – that would trigger mandatory de-escalation communication.
- Leverage its mediator role in the US-Iran dialogue to argue, at the UN Security Council level, for an internationally-guaranteed return to the Composite Dialogue framework as a condition for post-crisis normalisation.
- Engage the PCA process on the IWT to ensure India's non-compliance is formally recorded in international legal registers and to build a coalition of downstream-state support for treaty compliance as a principle of international water law.

Kissinger's observation that 'a reputation for reliability is a more important asset than demonstrations of tactical cleverness'³⁶ identifies precisely what India has been spending. The Nehruvian decades built a reputation as a state that honoured its

³⁴Jonas Jägermeyr et al., "A Regional Nuclear Conflict Would Compromise Global Food Security," *Proceedings of the National Academy of Sciences* 117, no. 13 (2020): 7071–7081, <https://doi.org/10.1073/pnas.1919049117>.

³⁵Syed Imran-ul-Hassan, "The Limits of Limited War and the Dangers of Escalation Dominance in the Aftermath of the Pakistan-India 2025 Crisis," British American Security Information Council, November 27, 2025, <https://basicint.org/the-limits-of-limited-war-and-the-dangers-of-escalation-dominance-in-the-aftermath-of-the-pakistan-india-2025-crisis/>.

³⁶Henry A. Kissinger, *World Order: Reflections on the Character of Nations and the Course of History* (New York: Penguin Press, 2014), 371. The full sentence reads: "Austria learned too late that in international affairs a reputation for reliability is a more important asset than demonstrations of tactical cleverness."

international commitments. What replaced it under Hindutva governance is volatility – a treaty suspended on four hours’ notice, an independent investigation refused before the evidence was a week old, a sequel to a war openly prepared while claiming victory in the original. South Asia’s nuclear flashpoint is no longer managed primarily by restraint. It is managed by luck.

The ratchet turns. Whether it can be stopped, by whom, and through what institutional mechanisms is the defining South Asian security question of 2026.

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