



Stability under Pressure

A Pakistani View on Nuclear Deterrence after Pahalgam

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► Key Takeaways

- From a Pakistani perspective, Islamabad's nuclear deterrent did not fail in May 2025; the crisis showed it still prevents full-scale war while leaving dangerous space for limited conventional exchanges, information warfare, and coercive signaling.
- India's "new normal", consolidated post-Pahalgam, seeks to normalize punitive strikes under labels like "counterterrorism" and "no nuclear blackmail", signaling readiness to use more force against alleged terrorism. Pakistan must keep deterrence credible without every crisis sliding prematurely to nuclear rhetoric.
- Pakistan's modernization is less about a bigger arsenal than about survivability, redundancy, second-strike credibility, and reinforcing conventional deterrence and resilience amid drones, precision strike, missile defense, cyber, AI-enabled ISR, and information manipulation.
- The debate about a supposed Pakistani nuclear umbrella for Saudi Arabia misreads Pakistan's deterrence logic, rooted in the South Asian threat and not a transferable or outsourced guarantee.

Introduction

The May 2025 India-Pakistan crisis after the Pahalgam attack¹ has generated a familiar but incomplete debate: did nuclear deterrence work, or did it merely allow both sides to fight a limited war under the nuclear shadow? The better answer is that deterrence worked at the level at which it was designed to work. It prevented a general war and an uncontrolled vertical escalation, and kept nuclear weapons in the background. But it did not prevent India from attempting to carve out space for conventional action, nor did it prevent Pakistan from responding conventionally to restore deterrence credibility.

This distinction matters for European audiences because Pakistan's nuclear doctrine is often read through alarmist shortcuts: tactical nuclear weapons, crisis instability, command-and-control anxieties, and, more recently, speculation about a Pakistani nuclear umbrella for Saudi Arabia. The strategic reality, however, is far less hysterical: Pakistan's nuclear capability emerged to offset an enduring asymmetry with India. Its purpose is defensive, India-specific, and tied to the prevention of a major war in South Asia.²

The Pahalgam crisis began after the April 22, 2025, attack in Indian-occupied Jammu and Kashmir, which killed 26 people. India accused Pakistan and launched strikes on May 7 against alleged terrorist infrastructure across the international border.³ Pakistan denied involvement and responded as the confrontation expanded into missiles, drones, artillery, and cross-border shelling on May 10,⁴ followed by a ceasefire⁵ reached through a DGMO-level contact and facilitated primarily by the United States' (US) diplomacy⁶.

Changes: a strategic environment reshaped by the May 2025 crisis

What the crisis actually demonstrated: nuclear deterrence tested by a limited war

The crisis should not be mistaken for deterrence collapse. It demonstrated a changing deterrence environment in which India seeks to test the lower rungs of the escalation ladder while assuming that Pakistan will absorb punishment to avoid escalation.

1. A. Hussain, "Pahalgam Attack: A Simple Guide to the Kashmir Conflict", *Al Jazeera*, May 2, 2025, available at: www.aljazeera.com.

2. F. H. Khan, *Eating Grass: The Making of the Pakistani Bomb*, Stanford: Stanford University Press, 2012.

3. S. Biswas, "Indian Air Strikes – How Will Pakistan Respond? Four Key Questions", BBC, May 7, 2025, available at: www.bbc.com.

4. A. Hussain, "Pakistan Launches Operation Bunyan Marsoos: What We Know So Far", *Al Jazeera*, May 10, 2025, available at: www.aljazeera.com.

5. "Pakistan, India Agree to Ceasefire with Immediate Effect", *Global Times*, available at: www.globaltimes.cn.

6. M. McClafferty, "Unpacking the May 2025 India-Pakistan Crisis: Mutual Perceptions, Nuclear Escalation Risks, and De-escalation Pathways", BASIC Report, March 31, 2026, available at: <https://basicint.org>.

That assumption is dangerous. Pakistan's response showed that deterrence cannot remain credible if one side repeatedly normalizes cross-border force while expecting the other to exercise unilateral restraint.

The fact that nuclear weapons were not used, and that Pakistan did not convene a National Command Authority meeting despite early reporting and rumor cycles, is important.⁷ This should be read not as weakness but as deliberate restraint: Pakistan kept the crisis within the conventional domain while signaling that its strategic deterrent remained intact.⁸

Yet the crisis also exposed the fragility of escalation management. The fighting involved missiles and drones fired at military installations and killed almost 70 people,⁹ making it the worst fighting in nearly three decades. The ceasefire cannot be credited solely to a weak bilateral crisis management architecture based on DGMO-level contacts. It also required diplomatic intervention and mediatory efforts, particularly from the US.¹⁰

The doctrinal challenge: India's "new normal" and its implications for Pakistan

The central doctrinal challenge for Pakistan after Pahalgam is India's attempt to institutionalize what Prime Minister Narendra Modi called a new benchmark and "new normal" in counterterrorism. In his May 12, 2025, address, Modi laid out three principles: India would respond to terrorist attacks on its own terms; it would not tolerate what it called nuclear blackmail; and it would not distinguish between terrorists and governments accused of supporting them.¹¹

For Pakistan, this is not merely rhetoric. It is an attempt to shift the burden of escalation onto Pakistan while allowing India to retain freedom of action. The phrase "nuclear blackmail" is especially problematic because it reframes Pakistan's deterrent as illegitimate even when Pakistan is responding to conventional strikes on its territory. It also obscures the fact that Pakistan's nuclear capability is not designed to enable terrorism, but to prevent India from launching a large-scale, protracted war, which could also have nuclear undertones.

7. "No meeting of National Command Authority Scheduled: Defense Minister", *Business Recorder*, May 10, 2025, available at: www.brecorder.com.

8. "Pakistan Test-Fires Ballistic Missile as Tensions with India Rise", *Al Jazeera*, available at: www.aljazeera.com.

9. "India-Pakistan: Avoiding a War in Waiting", *Asia Briefing No. 185*, International Crisis Group, September 17, 2025, available at: www.crisisgroup.org.

10. For a detailed analysis of the four-day May war 2025, see C. Clary, "Four Days in May: The India-Pakistan Crisis of 2025", Stimson Center, May 28, 2025, available at: www.stimson.org.

11. Transcript of Prime Minister Modi's Address, May 12, 2025, available at: www.mea.gov.in.

Pakistan's answer should not be louder nuclear signaling but doctrinal discipline. Full-Spectrum Deterrence¹² remains useful because it communicates that Pakistan can deter threats at multiple levels, from limited incursions to strategic attack by retaining an array of nuclear options at the tactical, operational, and strategic levels that cover all Indian targets and territory. But its credibility also increasingly depends on the strength of Pakistan's conventional response options. The more Pakistan can respond proportionately and effectively in the conventional domain, the less pressure there is to invoke nuclear weapons.¹³ In this sense, the May India–Pakistan clashes suggest that India's conventional superiority is more complex and less absolute, as Pakistan's increasing integration of advanced Chinese systems may progressively reshape the regional balance of power.

Narrative stability and the information battlefield

The May 2025 crisis also revealed that deterrence cannot be divorced from an increasingly complex information ecosystem. False claims, doctored images, deepfakes, exaggerated battlefield narratives, and social media nationalism may compress decision-making time and distort threat perception. This is reasonable to argue primarily because the May 2025 crisis demonstrated how fabricated content and AI-aided disinformation made it harder to verify events and increased the risk of misperception.¹⁴

Deterrence cannot be divorced from an increasingly complex information ecosystem

This is not a secondary issue. In South Asia, narratives can become escalatory instruments. Claims about attacks on nuclear-related sites, rumors of nuclear meetings, and triumphalist public messaging can create domestic pressure on leaders to escalate or deny off-ramps. Crisis stability now requires narrative stability:¹⁵ credible official communication, rapid debunking mechanisms, protected backchannels, and restraint by media ecosystems that often behave as amplifiers rather than filters.

Pakistan should invest in a formal bilateral crisis communication architecture that includes real-time fact-checking, diplomatic signaling, military-to-military communication, and Track 1.5 channels that do not collapse during crises. If nuclear weapons are key to a credible deterrence, strategic stability and preventing false narratives from becoming strategic triggers also appear to be necessary in such crises.

12. A. A. Abid, "The Efficacy of Pakistan's Full Spectrum Deterrence", *CISS Insight Journal*, Vol. 11, No. 1, 2023, pp. 1-21, available at: <https://journal.ciss.org.pk>.

13. Z. N. Jaspal, "Reimagining Pakistan's Conventional Deterrence post-May 2025", in: R. Akhtar (ed.), *Strategic Reckoning: Perspectives on Deterrence and Escalation Post-Pahalgam – May 2025*, Islamabad: CSSPR-IRS, 2025, available at: <https://csspr.uol.edu.pk>.

14. A. Das and P. K.B., "How the Indian Media Amplified Falsehoods in the Drumbeat of War", *The New York Times*, May 17, 2025, available at: www.nytimes.com.

15. R. Akhtar, "Two Rivals, One Crisis: A War of Narratives", *BASIC*, July 30, 2025, available at: <https://basicint.org>.

Modernization: adapting deterrence without an arms-race logic

According to the Stockholm International Peace Research Institute (SIPRI), as of January 2026, India is in possession of 190 nuclear warheads while Pakistan has 170 in its arsenal. These numbers are approximate because Pakistan does not publish official data on its arsenal. The more important issue is not numerical parity but credibility under technological change.

Survivability, redundancy, and second-strike: the core priorities of Pakistan's modernization

World nuclear forces, January 2025

	Deployed warheads		Stored warheads		Military stockpile		Retired warheads		Total inventory	
	2025	2025	2024	2025	2024	2025	2024	2025	2024	2025
United States	1,770	1,930	3,708	3,700	1,620	1,477	5,328	5,177		
Russia	1,718	2,591	4,380	4,309	1,200	1,150	5,580	5,459		
United Kingdom	120	105	225	225	-	-	225	225		
France	280	10	290	290	-	-	290	290		
China	24	576	500	600	-	-	500	600		
India	-	180	172	180	-	-	172	180		
Pakistan	-	170	170	170	-	-	170	170		
North Korea	-	50	50	50	-	-	50	50		
Israel	-	90	90	90	-	-	90	90		
Total	3,912	5,702	9,585	9,614	2,820	2,627	12,405	12,241		

Source: SIPRI Yearbook 2025, www.sipri.org.

Pakistan's modernization is driven by the need to preserve deterrence against India's expanding conventional and nuclear capabilities. Pakistan's nuclear forces, posture, and doctrine are not shaped by the growing global nuclear arms race or the disintegration of the arms control architecture. However, given that India's nuclear developments are also shaped by China's, the global nuclear arms race could have an indirect effect on Pakistan going forward.

According to the Bulletin of the Atomic Scientists, Pakistan appears to operate several road-mobile nuclear-capable ballistic missile systems, including Abdali, Ghaznavi, Shaheen-I/A, Nasr, Ghauri, and Shaheen-II, while Shaheen-III and the MIRV-capable Ababeel remain under development.¹⁶ Pakistan's road-mobile missile force has expanded, ostensibly with a view to enhancing both mobility and survivability in response to India's growing proclivity to resort to the use of force as well as its counterforce temptations. The Ababeel is particularly significant because it is connected to the credibility and survivability challenges created by India's ballistic missile defense ambitions. Pakistan has described the missile as one that is intended to reinforce deterrence in a regional BMD environment. The point is not simply to acquire more destructive capability; it is to deny India confidence that missile defense can neutralize Pakistan's retaliatory options.

Pakistan can also deliver both conventional and nuclear warheads. Given the growing salience of standoff weapons and strikes, the air leg is likely to become significant. The Ra'ad II air-launched cruise missile, with a range of 600km, could, for example, gain more prominence, strengthening Pakistan's Full-Spectrum Deterrence.¹⁷

The sea-based dimension is equally important. Pakistan's Babur-3 submarine-launched cruise missile remains in development, with earlier tests conducted from underwater platforms as Pakistan does not possess a nuclear submarine. Its eventual value lies in strengthening second-strike credibility, particularly as the Indian Ocean becomes more nuclearized and India develops its own sea-based deterrent, as enshrined in the India Technology Perspective and Capability Roadmap (TPCR-2025).¹⁸

The conventional-nuclear interface: conventional strength as a condition of strategic credibility

The most important lesson from May 2025 is that, just like in Europe, conventional strength is now central to nuclear stability in South Asia. Nuclear weapons may deter total war, but they do not automatically deter limited strikes, drone warfare, cyber operations, or disinformation-enabled coercion. Therefore, Pakistan faces a dual requirement: maintain a survivable nuclear deterrent while investing in conventional capabilities that can absorb, deny, and respond to limited aggression.

This includes integrated air and missile defense, deep precision strike capabilities, such as those of Pakistan's Fatah missile series,¹⁹ electronic warfare, hardened infrastructure, dispersal, mobility, cyber resilience, and credible retaliatory options below the nuclear threshold. It also includes naval modernization. In future crises, the Arabian

16. H. M. Kristensen et al., "Pakistan Nuclear Weapons, 2025", *Bulletin of the Atomic Scientists*, Vol. 81, No. 5, 2025, pp. 386-408, available at: <https://doi.org/10.1080/00963402.2025.2543685>.

17. S. A. Z. Jaffery, "The Raad-II and Pakistan's Full Spectrum Deterrence", *South Asian Voices*, December 13, 2018, available at: <https://southasianvoices.org>.

18. "Technology Perspective and Capability Roadmap (TPCR-2025)", *Insights on India*, September 6, 2025, available at: www.insightsonindia.com.

19. "Pakistan Successfully Test Fires Fatah-IV Cruise Missile: ISPR", *Dawn*, May 14, 2026, available at: www.dawn.com.

Sea and the wider Indian Ocean may become spaces for signaling, interdiction, and coercion. Pakistan's deterrent will therefore be judged not only by missiles and warheads, but by the resilience of its command systems, its ability to sustain operations, and its capacity to deny India escalation dominance.

In the aftermath of the May 2025 crisis, questions around escalation control and credible response options also became more pronounced. Against this backdrop, Pakistan's announcement of the Army Rocket Force Command, a new, independent command of the Pakistan Army dedicated to the handling and deployment of conventional missiles, signals a shift toward strengthening non-nuclear strike capabilities within its broader deterrence framework. ARFC represents Pakistan's effort to expand credible conventional strike options, creating space between diplomacy and nuclear escalation. By emphasizing precision, range, and a distinct command structure, it aims to enhance deterrence while managing escalation risks through clearer nuclear-conventional separation.²⁰

But this is where European debates often misunderstand Pakistan. They focus on the dangers of Pakistan's nuclear posture without examining the pressures that produce it: India's conventional modernization, missile defense, long-range precision strikes, ISR integration, and increasingly assertive crisis behavior. Stability cannot be produced by asking Pakistan to show restraint while ignoring India's effort to create a permanent punitive-strike option.

Europe focus on the dangers of Pakistan's nuclear posture without examining the pressures that produce it

The Saudi misreading: why the SMDA does not constitute a nuclear umbrella

The post-September 2025 debate about the Pakistan-Saudi Strategic Mutual Defence Agreement (SMDA) has created another layer of misunderstanding. The agreement formalized a long-standing defense relationship and stated that aggression against one would be considered aggression against both. Pakistan's Foreign Office described it as defensive in nature and not directed against any third country.²¹ Nuclear weapons or the extension of a nuclear umbrella to Saudi Arabia are, however, unlikely to be on the cards.

Despite strong collective-defense language, the pact does not constitute an automatic war guarantee or extend a nuclear umbrella; instead, it reflects political solidarity and joint deterrence within carefully preserved national constraints.²² The

20. R. Akhtar, "Pakistan's Army Rocket Force Command", Pakistan Politico, August 14, 2025, available at: pakistanpolitico.com.

21. "Statement on the Strategic Mutual Defense Agreement (SMDA)", Ministry of Foreign Affairs, Weekly Media Briefing, September 19, 2025, available at: <https://mofa.gov.pk>.

22. R. Akhtar, "Beyond the Hype: Pakistan-Saudi Defense Pact Is Not a Saudi Nuclear Umbrella", Report for the Belfer Center for Science and International Affairs, September 18, 2025, available at: www.belfercenter.org.

distinction is essential. Defense cooperation is not akin to nuclear sharing. Pakistan's deterrent was built under severe sanctions and technological denial with a view to deterring existential threats from India only. While the threat from India still looms large, Pakistan's nuclear capability is not a commodity to be extended casually into the Middle East. Misreading the Saudi agreement as a nuclear umbrella says more about external anxiety than about Pakistan's nuclear doctrine. These external trepidations stem from an unfounded claim that Pakistan would extend its deterrent to other Muslim countries, particularly against Israel. While Pakistan's nuclear strategy militates against the provision of any kind of nuclear umbrella, the SMDA might be seen as a vindication of such unsubstantiated fears.

Future challenges and strategic imperatives for regional stability

Pakistan's future deterrence challenge will be shaped by five interlocking pressures, each reinforcing the others in ways that complicate escalation management and strategic signaling.

First, India will likely continue to test limited war concepts under the contested pretext of counterterrorism. This framing provides political cover for calibrated military action while attempting to remain below Pakistan's perceived thresholds.²³ The challenge for Pakistan is not only to deter such probes, but to do so without validating India's narrative or triggering uncontrolled escalation. This requires increasingly precise signaling, demonstrating capability and resolve while maintaining crisis stability.

Pakistan's future deterrence challenge will be shaped by five interlocking pressures

Second, emerging technologies will make crises faster, less transparent, and more vulnerable to miscalculation. The integration of AI-enabled ISR, autonomous systems, cyber operations, and real-time information flows compresses decision-making timelines and introduces ambiguity into attribution and intent. In such an environment, the traditional space for deliberation shrinks, raising the risk that misread signals or false positives could drive premature escalation.²⁴ *Apropos* of South Asia, all of this is concerning, not least because of geographic proximity, the sheer absence of dialogue between India and Pakistan, and the presence of crisis triggers.

Third, the development of India's missile defense architecture and precision-strike capabilities will push Pakistan to preserve survivability and assured retaliation. As India expands its counterforce options²⁵ and defensive systems, the credibility of Pakistan's

23. N. Mehmood and U. Haider, "Two Decades of India's Cold Start Doctrine", *Comparative Strategy*, 2025, pp. 1-19, available at: www.tandfonline.com.

24. R. Hersman, "Wormhole Escalation in the New Nuclear Age", *Texas National Security Review*, Summer 2020, pp. 90-109, available at: <https://tnsr.org>.

25. C. Clary and V. Narang, "India's Counterforce Temptations: Strategic Dilemmas, Doctrine, and Capabilities", *International Security*, Vol. 43, No. 3, 2019, pp. 7-52.

deterrent will increasingly hinge on its ability to ensure second-strike capability under degraded conditions. This places pressure on force dispersal, mobility, concealment, and the robustness of command-and-control structures, while also raising concerns about crisis instability if either side fears disarming strikes.

Fourth, the maritime domain will become more relevant to deterrence. The extension of strategic competition into the Indian Ocean introduces new variables, including sea-based deterrent platforms, protection of sea lines of communication, and the risks of naval brinkmanship. Unlike land-based dynamics, the maritime space is less bounded and more opaque, complicating signaling and increasing the potential for inadvertent encounters with strategic consequences.²⁶

Fifth, Pakistan will face the challenge of converting its improved crisis image into durable narrative credibility, as international perceptions remain fluid, contested, and susceptible to rapid reversal under competing geopolitical and informational pressures. While the May 2025 crisis may have opened space for a more balanced reading of Pakistan's conduct,²⁷ this shift is neither consolidated nor guaranteed. Sustaining credibility will require consistent signaling, disciplined information management, and the ability to counter disinformation in real time, particularly in an era where narrative dominance can shape not just global opinion but also the escalation calculus of adversaries.

Pakistan's deterrence challenge is no longer confined to capabilities alone

Taken together, these pressures suggest that Pakistan's deterrence challenge is no longer confined to capabilities alone; it is equally about managing perception, timing, and credibility across multiple domains under conditions of accelerating technological and geopolitical change.

Pakistan should resist both complacency and overreaction. It does not need an open-ended arms race. It needs a credible, survivable, and professionally managed deterrent; stronger conventional capabilities; better crisis communication; and a diplomatic strategy that explains Pakistan's deterrence logic to audiences that often know it only through stereotypes.

26. B. Newman, "Nuclear Ambiguity in the Indian Ocean", Stimson Center, April 30, 2025, available at: www.stimson.org.

27. U. Jamal, "2025: The Year Pakistan Stepped Back into the Spotlight", *The Diplomat*, December 24, 2025, available at: <https://thediplomat.com>.

Conclusion

The May 2025 crisis and the post-crisis environment show that Pakistan's nuclear deterrent remains credible and robust. However, both credibility and robustness are under stress. Therefore, they must be maintained through modernization, restraint, survivability, and political clarity.

The May 2025 crisis showed that Pakistan can respond conventionally, keep nuclear weapons in the background, and still prevent India from imposing a unilateral escalation script. That is a sign of deterrence stability. But it also showed how quickly limited war, disinformation, and domestic political theatre can narrow the space for rational decision-making.

For Pakistan, the task ahead is to ensure that nuclear deterrence remains what it was meant to be: a shield against major war, not a substitute for conventional preparedness, diplomacy, or strategic communication. For Europe, the task is to understand Pakistan's nuclear posture in its actual regional context, not through inherited clichés. Stability in South Asia will not come from denying Pakistan's security concerns. It will come from taking them seriously. Therefore, engagements and dialogue between European and Pakistani officials, academic communities, and think tanks are particularly important. These would allow for both sides to understand each other's concerns and regional peculiarities that shape their nuclear postures.

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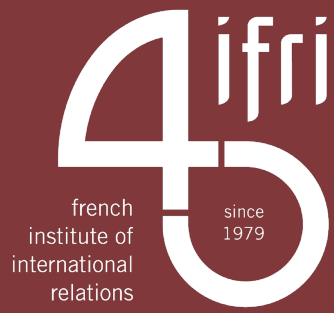
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Cover: Pakistani intermediate-range ballistic missiles on display at an exhibition in Karachi in 2008

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