

Nuclear Stability or Strategic Crises? A Contextual Analysis of the India–Pakistan Conflict of May 2025

Abdul Basit*

MS Scholar, Institute of International Relations and Peace Studies, Shah Abdul Latif University, Khairpur, Email: basitghanghro7@gmail.com

Shahar Bano

MS Scholar, Institute of International Relations and Peace Studies, Shah Abdul Latif University, Khairpur, Email: shaharbanosoomro7@gmail.com

Imran Ali Mahar

MS Scholar, Institute of International Relations and Peace Studies, Shah Abdul Latif University, Khairpur, Email: maharimran0004@gmail.com

Abstract

This article examines the strategic-stability consequences of the four-day India–Pakistan military confrontation of 7–10 May 2025, the most extensive conventional clash between the two nuclear-armed states since 1971. Triggered by the 22 April 2025 terrorist attack at Pahalgam, the crisis saw India conduct standoff strikes under Operation Sindoor against sites in Pakistan and Pakistan-administered Kashmir, followed by four days of reciprocal air, drone, and missile exchanges before a United States-brokered ceasefire on 10 May. Using a single-case, theoretically structured qualitative design combining contextual analysis and process tracing, the article asks how the crisis affected strategic stability, understood here as the joint condition of deterrence stability (the absence, on either side, of a rational incentive to strike first) and crisis stability (the absence of structural or informational pressure toward inadvertent escalation) — under conditions of mutual nuclear deterrence. It draws on official government statements, open-source and satellite-imagery investigations, and the emerging policy and scholarly literature produced by research institutions including the Stimson Center, the Carnegie Endowment, the Observer Research Foundation, and the Centre for International Strategic Studies and Institute of Strategic Studies, Islamabad. The stability–instability paradox provides the guiding theoretical framework, assessed alongside a compellence-based rival explanation drawn from the Pakistani-origin literature. The analysis finds that the crisis broadly conforms to the paradox's central proposition: mutual nuclear deterrence widened, rather than foreclosed, the space for conventional military action, permitting India to strike deep into Pakistani territory without triggering nuclear escalation. Yet the crisis also exposed the fragility of this equilibrium, evidenced by contested nuclear signaling around Pakistan's National Command Authority, an unverified rumor of a strike near nuclear-associated infrastructure at Kirana Hills, and pervasive misperception on both sides regarding the other's intentions. The article further argues that durable crisis termination rested not only on bilateral deterrence and escalation control but on a third, more contingent pillar: credible external mediation that existing bilateral formulations of the paradox do not adequately capture. The article concludes that the May 2025 crisis has reset, rather than resolved, the baseline of India–Pakistan strategic competition, with implications for crisis-management architecture, third-party diplomacy, and future research on technologically enabled escalation in South Asia.

Keywords: Nuclear deterrence; stability–instability paradox; compellence; South Asia; Operation Sindoor; crisis escalation; strategic stability; India–Pakistan relations

Introduction

South Asia has long been characterized as a region where an overlay of nuclear deterrence coexists uneasily with recurrent sub-conventional and conventional confrontation between India and Pakistan. The events of 7–10 May 2025 provided the starkest test of that coexistence in over two decades. Following a terrorist attack at Pahalgam in Indian-administered Jammu and Kashmir on 22 April 2025, in which twenty-six civilians were killed, India launched Operation Sindoor, a series of standoff missile and air strikes against nine sites in Pakistan and Pakistan-administered Kashmir.

What followed was not a contained, one-off punitive strike of the kind seen after the 2016 Uri attack or the 2019 Pulwama–Balakot crisis, but four days of reciprocal air, drone, and missile engagements that extended, for the first time since the 1971 war, into Pakistan's Punjab heartland and, for the first time in the history of the rivalry, saw sustained drone-on-drone combat between the two states. The confrontation ended with a ceasefire announced on 10 May, mediated substantially by the United States.

The research problem this article addresses is therefore not narrowly empirical — whether the May 2025 crisis proved that mutual nuclear deterrence still deters war, or that it is beginning to strain the guardrails that have so far prevented uncontrolled escalation in South Asia — but conceptual: what does this crisis suggest about the status of mutual nuclear deterrence as a mechanism for keeping crises under control? The recentness of the crisis also means that the available literature is filled with policy memoranda, think tank assessments, and even journalistic investigations rather than with peer-reviewed theoretical scholarship, which can help bridge this gap through a single-case analysis, structured in a theoretical way.

The research has multiple significances. Firstly, the conflict is the third time a large-scale, violent power struggle has been openly discussed in this frame as being a nuclear issue between two countries; the first time would be Sino-Soviet border clashes in 1969, and the second through Kargil war in 1999 (Clary, 2025) which in itself is debatable as to when other clashes between India and Pakistan should be counted or not, and which is a premise for discussion here, and not a settled fact. Second, this was the first time large-scale drone warfare was used by Pakistan in its crisis with India, the first time Pakistan deployed modern Chinese-origin air-defense and air-combat systems. Third, the crisis will be used to embed policy organizations with new baseline expectations, doctrines and risk tolerances which influence the next India–Pakistan crisis, such that the correct theoretical interpretation of the crisis will remain of ongoing policy concern. Fourth, and central as far as the argument is concerned, which will be presented below, the resolution of the crisis involves an active United States mediation, raising a question that the bilateral literature has not adequately covered: Does the strategic stability of South Asia now depend on three pillars rather than two?

A single research question guides this article: how did the May 2025 India–Pakistan military confrontation affect strategic stability under conditions of mutual nuclear deterrence? Its corresponding objective is to examine whether the confrontation reinforced or undermined strategic stability within a nuclear deterrence environment. The article proceeds as follows. Section 2 reviews the existing literature on deterrence and South Asian strategic stability, as well as the emerging body of analysis that specifically addresses the May 2025 crisis. Section 3 sets out the

stability–instability paradox as the article's theoretical framework, defines strategic stability, specifies what evidence would disconfirm the paradox, and positions a compellence-based rival explanation. Section 4 details the qualitative research design. Section 5 provides a concise operational background to the crisis. Section 6 presents the analysis, organized around deterrence dynamics, escalation and signaling, the conventional–nuclear interface, strategic communication, and third-party diplomacy. Section 7 discusses the findings in relation to the theoretical framework, the rival compellence account, and existing literature, and Section 8 concludes with theoretical and policy implications.

Literature Review

The two originating points for the theory used throughout this article — the classical statement of the stability–instability paradox in Waltz (1981), and the escalation-ladder and coercive-bargaining concepts developed by Kahn (1965) and Schelling (1966) — are cited here to attribute authorship of concepts that continue to organize the field.

This apparatus has been continually revised within recent peer-reviewed work specifically addressing the India–Pakistan–China nuclear triangle. Bashir (2022), writing in the *Journal for Peace and Nuclear Disarmament*, argues that Pakistan is compelled to pursue so-called full-spectrum deterrence further because of the growing Indo-US defense partnership and India's ongoing conventional and nuclear modernization. In the *Bulletin of the Atomic Scientists'* nuclear notebook series, Kristensen, Korda, and Johns (2023) offer a current open-source description of the force structure and doctrine of the Pakistani nuclear arsenal, describing how former Strategic Plans Division advisor Khalid Kidwai has articulated a Pakistani doctrine of full-spectrum deterrence encompassing strategic, operational, and tactical tiers of weapons designed to deny India any rung of the escalation ladder at which conventional or limited nuclear pressure could be applied without cost. Narejo and Khan (2024) similarly characterize Pakistan's doctrine as non-declaratory and deliberately ambiguous, such that it is the absence of a clearly stated threshold, rather than the presence of one, that has constrained India's conventional options over time. Most directly salient to the theoretical argument developed here is Kurita's (2025) work in the *Journal of Strategic Studies* on how Pakistan has layered limited nuclear options — short-range tactical systems in particular onto full-spectrum deterrence, deliberately increasing the salience of inadvertent escalation risk even in the face of relatively limited Indian conventional pressure, a mechanism revisited in Section 6.5 when analyzing events of 9–10 May 2025.

This recent literature converges on two points that remain relevant to the current case. First, doctrinal development in both countries, though contested, has generally proceeded from the shared assumption that the stability–instability paradox continues to hold in South Asia, such that the practical contest between the two states is over where the effective 'ceiling' on conventional action sits, rather than whether a ceiling exists at all. Second, this doctrinal literature was produced against the backdrop of a rivalry that had already, since the 1998 overt nuclearization of the sub-continent, generated a recurring sequence of crises from Kargil in 1999 through the 2016 Uri and 2019 Balakot episodes, each of which tested, without definitively resolving, the durability of the equilibrium the doctrinal literature describes.

A distinct and rapidly growing body of analysis has emerged since May 2025 addressing Operation Sindoor directly, though almost entirely through think-tank, policy-institute, and journalistic

channels rather than peer-reviewed journals, a lag attributable to the short interval between the crisis and the time of writing. Clary's (2025) working paper for the Stimson Center offers the most methodically cautious open-source reconstruction of the crisis timeline, explicitly foregrounding the scale of misinformation and disinformation generated by both governments and stressing that any analysis of the crisis must be treated as provisional. Writing for *War on the Rocks*, Tarapore (2025) situates Operation Sindoor within an evolving trajectory of Indian punitive responses running from the 2016 Uri retaliation through the 2019 Balakot strike, arguing that each iteration has tested progressively higher thresholds of what India could do to Pakistan without triggering full-scale war. Ladwig's (2025) commentary for the Royal United Services Institute likewise reads the operation as a 'calibrated' use of force aimed at enhancing India's conventional deterrence credibility. The edited special report by Pant and Patil (2025) for the Observer Research Foundation brings together a range of Indian experts who, across its sections on doctrine, operations, and diplomacy, largely concur that the operation reaffirmed India's deterrence credibility in ways that earlier, more restrained responses had not. The Carnegie Endowment's (2025) assessment similarly treats the operation as a broadly successful case study in India's still-developing punitive doctrine, while cataloguing remaining operational deficiencies.

Pakistani and more skeptical commentary reaches markedly different conclusions from the same events. Kazmi (2025), writing for the Centre for International Strategic Studies in Islamabad, contends that Operation Sindoor should be understood not as a successful exercise in deterrence but as a shift toward compellence — the attempted coercion of a change in Pakistani behavior through the use of force, rather than merely the threat of it — and argues that this shift increased, rather than reduced, the risk of future escalation. A parallel institutional voice from Pakistan reinforces this reading from a different angle: remarks by senior figures at the Institute of Strategic Studies, Islamabad, in the weeks after the ceasefire framed the crisis not as a demonstration of Indian deterrence but as confirmation that Pakistan's full-spectrum deterrence and its improved conventional air-combat performance continue to constrain India's operational choices (ISSI, 2025). White's (2025) analysis for the Brookings Institution takes a more centrist position, drawing operational and doctrinal lessons for both states without endorsing either side's declared narrative of victory.

The current study responds to two gaps in this literature. First, few accounts systematically examine the military and diplomatic sequence of events in light of an explicitly stated theoretical framework, as opposed to a national narrative of success or failure. Second, the literature is polarized along national lines — deterrence restoration on the Indian side, destabilizing compellence on the Pakistani side — such that the more basic question of whether the crisis confirmed or challenged the stability–instability paradox implicitly underpinning both positions remains unresolved. This article addresses the gap through a theoretically explicit, single-case process-tracing analysis that treats the deterrence/compellence dispute as a question nested within, rather than a rival to, the paradox (see Section 3).

Theoretical Framework: The Stability–Instability Paradox

This article adopts the stability–instability paradox as its primary theoretical framework. The paradox, most closely associated with Waltz's (1981) argument regarding the effects of nuclear proliferation, holds that the acquisition of secure nuclear arsenals by both parties to a rivalry stabilizes the relationship at the strategic level because neither side can rationally contemplate a war

that risks nuclear retaliation and mutual destruction while simultaneously destabilizing the relationship at the conventional and sub-conventional levels, because both sides come to believe that the shared fear of nuclear escalation places a ceiling on how severely a limited clash can be punished. Strategic stability and conventional instability, on this account, are not opposing conditions but two faces of the same underlying dynamic.

Strategic stability itself is treated here as comprising two related but analytically distinct conditions, following standard usage in the deterrence literature (cf. Colby & Gerson, 2013): deterrence stability, meaning the absence, on either side, of a rational incentive to strike first; and crisis stability, meaning the absence of structural or informational pressure — including misperception, disinformation, and compressed decision timelines — toward inadvertent or unauthorized escalation once a confrontation is underway. The stability–instability paradox, on the reading adopted here, makes a claim primarily about deterrence stability: it predicts that deterrence stability at the strategic level can coexist with, and indeed enable, instability at the conventional level. It makes no comparably strong prediction about crisis stability, which is instead treated in this article as an open empirical question to be assessed against the May 2025 evidence in Section 6.

This is not merely a historical curiosity: the paradox remains the organizing premise of the current doctrinal literature reviewed in Section 2, including Bashir's (2022) and Kristensen et al.'s (2023) accounts of Pakistani force posture and Kurita's (2025) analysis of limited nuclear options, each of which treats the location of the ceiling, rather than its existence, as the live strategic question. The present article applies the same premise to the events of May 2025.

This framework is preferable to a narrower classical-deterrence account for two reasons. First, classical deterrence theory holds that deterrence succeeds only when an opponent refrain from hostile action altogether; taken literally, that standard cannot easily explain how Indian forces struck deeper into Pakistani territory than at any point since 1971 without the confrontation escalating into general war. The stability–instability paradox treats this outcome as expected rather than anomalous, since it predicts that nuclear deterrence at the top enables, rather than forecloses, conventional action beneath it. Second, the paradox offers a single, parsimonious lens for organizing the otherwise disparate elements of the crisis: punitive airstrikes, drone warfare, ballistic-missile exchanges, and diplomatic ceasefire negotiation consistent with this study's requirement of theoretical consistency.

A competing theory embodied in much of the literature from the Pakistani side reviewed in Section 2 (Kazmi, 2025; ISSI, 2025) argues that Operation Sindoor is more aptly viewed in a compellence framework. In this view, India's deployment of force was motivated by a desire to change some aspect of Pakistani behavior, and uses of force that aim to change a rival's behavior—compellent, as they're called in the coercive-bargaining literature, after Schelling (1966)—are, on average, more escalatory than are uses aimed at preventing a rival from acting (called deterrent in that literature), since they require the rival to be seen to have backed off. This article treats the deterrence/compellence distinction not as a rival paradigm to the stability–instability paradox but as a question nested within it: both a deterrence-restoration reading and a compellence reading of India's motives are compatible with an expanded zone of conventional action beneath an unbroken nuclear ceiling, since the paradox is agnostic as to which motive predominates. Section 7 returns to this distinction when weighing whether the May 2025 evidence favors

one reading over the other, or whether — as this article ultimately argues — the evidence does not permit that question to be resolved on the current record.

The operationalization of the paradox for this analysis has resulted in two expectations that can be tested and can process-trace the May 2025 crisis. The first is that both actors will show “calibrated” restraint at the end of escalation — here in the signaling of nuclear weapons and attacks on facilities that provide nuclear services — but will show a lot of flexibility at the intermediate levels. The second expectation is that this increased “conventional latitude” will in turn pose new escalation risk, as the “fog of war” is not calibrated to perfection, and each side may think the other has a different estimate of what acceptable actions are. If either side targeted nuclear command and control facilities or issued formal nuclear alerts, or took the nuclear posture to a material degree higher than was occurring during the crisis, or if the crisis was resolved through bilateral negotiations despite the offer of mediation and its use, the paradox would be significantly undermined. Evidence of restraint at the top of the ladder combined with expanded conventional latitude — even where accompanied by misperception-driven volatility at the middle rungs — is treated here as consistent with, rather than falsifying, the paradox. The findings in Section 6 are assessed against both expectations and this disconfirmation threshold.

Methodology

Research Design

The study employs a qualitative research design combining contextual analysis with process tracing, appropriate to a single, temporally bounded, and information-scarce crisis case. Contextual analysis situates the events of 7–10 May 2025 within the longer trajectory of India–Pakistan crisis behaviour since the 1998 overt nuclearization of the subcontinent, while process tracing reconstructs the sequence of military and diplomatic moves within the crisis itself to identify the causal logic connecting escalatory and de-escalatory decisions on both sides. Process tracing is used here in the more limited sense of structured within-case sequencing used to adjudicate between the paradox's two operationalized expectations and the rival compellence account set out in Section 3, rather than in the fuller diagnostic sense of formal hoop- and smoking-gun-test protocols, given the still-contested state of primary evidence discussed in Section 4.4.

Case Selection

The May 2025 crisis is selected as a most-likely case for testing the stability–instability paradox: it represents, by the assessment of independent analysts, the most extensive conventional military confrontation between India and Pakistan since the 1971 war and the first to combine sustained air, drone, and ballistic-missile exchanges (Clary, 2025). If mutual nuclear deterrence does not visibly widen the space for conventional action in a crisis of this scale — involving novel drone warfare and great-power-supplied technology on both sides — the paradox would be a poor candidate for explaining any less extreme India–Pakistan confrontation. Single-case design is appropriate given the scale of the crisis, the novelty of the technology involved, and the immediate policy relevance of the case; single-case limitations, including constraints on generalizability beyond the India–Pakistan dyad, are noted in Section 4.4.

Data Sources and Analytical Approach

Sources include official governmental statements and press briefings from India's Ministry of External Affairs and Ministry of Defence and from Pakistan's Inter-Services Public Relations directorate; independent journalistic investigations using satellite imagery and open-source verification, including reporting by the Washington Post, Reuters, and the New York Times; policy research from the Stimson Center, the Carnegie Endowment for International Peace, the Observer Research Foundation, the Centre for International Strategic Studies and Institute of Strategic Studies (Islamabad), the Royal United Services Institute, and the Brookings Institution; and the foundational theoretical literature cited in Section 2. Each factual claim is cross-checked, where possible, against at least one source independent of the government making it, following the evidentiary caution modelled by Clary (2025); because Clary's (2025) reconstruction is itself the most comprehensively cross-checked open-source chronology available at the time of writing, it necessarily anchors much of the sequence in Section 5, and this reliance is treated as a limitation rather than a strength (Section 4.4). The analytical approach consists of arranging verified events into a chronological sequence (Section 5) and then coding each event according to its position on Kahn's (1965) escalation ladder and its consistency with the two theoretical expectations and disconfirmation threshold set out in Section 3.

Limitations and Ethical Considerations

Four limitations qualify the analysis. First, the crisis generated an unusually high volume of unverified claims and outright disinformation from both governments and from social media accounts on both sides, meaning that some details, including the precise causes of reported aircraft losses and the extent of damage inflicted at various sites, remain genuinely contested in the open-source record (Clary, 2025); where evidence is contested, this is flagged explicitly rather than resolved by assumption. Second, the recency of the crisis means peer-reviewed literature remains thin; the study compensates by relying on institutionally vetted research-institute publications while treating their claims, particularly where they track national narratives, with appropriate scepticism. Third, the analysis leans heavily on a single secondary chronology (Clary, 2025) for much of its factual sequencing; while this source is itself methodologically cross-checked, the study's own triangulation is correspondingly narrower than ideal, and this constraint should temper confidence in fine-grained sequencing claims. Fourth, as a single-case study, the findings speak most directly to the India–Pakistan dyad and should be extended to other nuclear dyads only with caution. Ethically, the study relies exclusively on secondary and open-source material, involves no human subjects, and has sought throughout to represent Indian, Pakistani, and third-party perspectives on contested facts even-handedly rather than adopting either government's declared narrative of victory.

Background: Sequence of Events

The crisis originated in the 22 April 2025 terrorist attack at Pahalgam, in Indian-administered Jammu and Kashmir, in which twenty-six civilians were killed; India attributed responsibility to Pakistan-based militant groups, an attribution Pakistan denied (Al Jazeera, 2025). In the following two weeks, India suspended the Indus Waters Treaty, and both governments undertook military and diplomatic signaling, including artillery exchanges along the Line of Control. On the night of 6–7 May, India launched Operation Sindoor, striking nine sites in Pakistan and Pakistan-

administered Kashmir that it identified as militant infrastructure; Pakistan claimed the strikes caused civilian casualties and asserted that it had shot down multiple Indian aircraft, a claim subsequently given qualified support by independent satellite and crash-site investigation (Clary, 2025). Over the following three nights, the two states exchanged escalating rounds of drone strikes, culminating on the night of 9–10 May in India's strikes on eleven Pakistani sites, including the Nur Khan airbase within the Chaklala military cantonment near Rawalpindi, and in Pakistan's retaliatory Operation Bunyan-un-Marsoos, which employed Fatah-series short-range ballistic missiles against Indian military installations. Amid intensifying United States diplomatic engagement, and following a brief and contested episode in which a meeting of Pakistan's National Command Authority was announced and then denied, a ceasefire was announced by both governments and by the United States on the evening of 10 May, effective from 5:00 p.m. Indian Standard Time.

Table 1. Chronology of Key Events, 22 April – 10 May 2025

Date	Event	Primary Source(s)
22 Apr 2025	Terrorist attack at Pahalgam kills 26 civilians	Al Jazeera, 2025
23–24 Apr 2025	India suspends Indus Waters Treaty; Pakistan warns of “act of war” response.	Clary, 2025
24 Apr–6 May 2025	Diplomatic signalling, troop mobilisation, LoC firing	Clary, 2025
6–7 May 2025	Operation Sindoor: India strikes 9 sites in Pakistan/Pakistan-administered Kashmir	Clary, 2025; Al Jazeera, 2025
7–8 May 2025	Pakistani drone strikes; Indian retaliatory drone strikes on air-defence radars	Clary, 2025
8–9 May 2025	Continued drone exchanges; U.S. intelligence assessment shifts	Clary, 2025
9–10 May 2025	India strikes 11 sites incl. Nur Khan airbase; Pakistan launches Fatah-I/II missiles (Op. Bunyan-un-Marsoos)	Clary, 2025
10 May 2025 (morning)	Reported, then denied, Pakistani National Command Authority meeting	Clary, 2025
10 May 2025 (evening)	U.S.-brokered ceasefire announced	Clary, 2025

Analysis

Deterrence Dynamics and the Restoration of Credibility

In the immediate term, the principal declared goal of Operation Sindoor was to restore the credibility of India's deterrent against cross-border militancy — credibility that Indian officials and analysts argue the more limited 2016 and 2019 responses had only partially reestablished (Tarapore, 2025; Ladwig, 2025). In sharp contrast to those earlier strikes, which were confined to areas near the Line of Control, Operation Sindoor targeted sites deep inside Pakistani Punjab, at Muridke and Bahawalpur, signaling that geographical proximity to the LoC no longer offered sanctuary (Tarapore, 2025). This is a textbook illustration of the latitude the stability–instability

paradox predicts India should possess: because mutual nuclear deterrence removes Pakistan's incentive to treat conventional retaliation as grounds for nuclear escalation, India was able to undertake an unprecedented degree of conventional punitive force.

Pakistani analysts dispute that this constitutes successful deterrence restoration. By the classical logic Kazmi (2025) invokes, deterrence succeeds only when hostile action is avoided altogether; on this view, the very fact that force was used in Operation Sindoor signals a failure of deterrence rather than its restoration. In this reading, India's declared posture of 'calibrated deterrence' is better described as compellence: the use of force to induce a change in Pakistani behavior and is accordingly more escalatory in character than deterrence proper. This is not merely a definitional dispute but a genuine theoretical disagreement about whether conventional expansion beneath an implicit nuclear ceiling makes a rivalry more or less stable; precisely the question this article's theoretical framework, set out in Section 3, is designed to adjudicate.

Escalation Dynamics and the Crisis Ladder

Mapped onto Kahn's (1965) escalation ladder, the crisis moved through recognizably discrete rungs: diplomatic and economic signaling (22 April–6 May); standoff strikes on non-state militant infrastructure (7 May); reciprocal strikes on air-defense and military infrastructure short of population centers (7–9 May); and strikes approaching, but consciously avoiding, the adversary's political and nuclear-command center (9–10 May). Neither state moved toward targeting population centers as a matter of policy, and neither credibly threatened nuclear use. This is consistent with the paradox's first expectation: substantial conventional latitude beneath an unstated but operative nuclear floor.

The clearest example of calibrated escalation lies in how the two states framed the reciprocal drone strikes of 7–9 May: Indian authorities described their action as being 'in the same domain, with the same intensity' as the preceding Pakistani drone attack, a statement of proportionality that Clary (2025) notes was addressed as much to Pakistan as to third parties. Yet the same episode also illustrates the paradox's second expectation that calibration under uncertainty is imperfect. India's ostensibly proportionate response was interpreted in Pakistan as an unprovoked new attack rather than a proportionate reply, especially because Pakistan's military spokesperson had officially denied that Pakistan had carried out the drone strikes to which India was responding (Clary, 2025). Proportionate signaling, in other words, only stabilizes a crisis if both sides agree on what preceded it; where that agreement is absent, each side's confidence in its own proportionality becomes, from the other side's perspective, a reason to escalate further.

Military Operations and the Conventional–Nuclear Interface

The night of 9–10 May produced the crisis's most significant instance of conventional coercion bordering on nuclear signaling. India's strike on the Nur Khan airbase, located a few kilometers from the nuclear command-and-control infrastructure of the Chaklala military cantonment, which hosts Pakistan's Strategic Plans Division, did not directly target nuclear-related facilities, but brought ordnance within proximity of them (Clary, 2025). Indian officials were reportedly aware of the strike's symbolic proximity to Pakistan's nuclear command infrastructure while maintaining that the Strategic Plans Division itself was never a target.

Adding to the confusion was a never-finally-confirmed report of India striking an alleged nuclear-storage base at Kirana Hills near Sargodha during and after the crisis, along with images that were shared to suggest it was destroyed, but then were not independently open-source investigated. The episode is analytically significant less for what actually happened — on the best available evidence, nothing — than for what it reveals about the fragility of the stability–instability equilibrium under crisis conditions. At minimum, the rumor was plausible and alarming enough to spread widely and to be treated seriously by analysts assessing the risk of inadvertent escalation." had it really happened or been seriously believed to have happened, a more unconstrained Pakistani reaction cannot be ruled out.

Strategic Communication and the Information Environment

The two governments conducted a great deal of strategic communication during the crisis (of somewhat different nature). Indian official statements tended to be more controlled than Pakistani ones and did not go very far beyond what could be subsequently verified. One partial exception was the claim that more than 100 militants were killed in the initial strikes; the extent of Indian aircraft losses, meanwhile, was neither confirmed nor denied by Indian authorities — a non-denial denial that received comparatively little scrutiny at the time." Meanwhile, Pakistani official sources had asserted some other things that were later revealed to be either unverified or outright lies, such as Indian missiles landing in Indian territory near Amritsar, which were never substantiated later (Clary, 2025).

This information asymmetry in the discipline has strategic-stability ramifications other than just in reputation costs. Both publics were largely dependent on storylines provided by their own governments, and independently verifiable information was scarce. This provided an opportunity for misinformation or spin on either side to affect the crisis in real time, mutual threat assessment, an element that Cold War deterrence theory did not consider due to the assumption that threat perceptions were fairly accurate. This risk was exacerbated by the unprecedented amount of unverified social media content (Clary, 2025) that both governments had trouble countering or containing.

Nuclear Rhetoric and Doctrine

Compared with some of the previous Indo-Pakistani crises, there was less pro-public relations hype during the overt flush. The biggest incident in the nuclear vicinity was a statement by Pakistan's Prime Minister in the morning of 10 May stating that he summoned a National Command Authority meeting, the body tasked with decisions regarding the Pakistani nuclear arsenal, almost immediately followed by a denial from Pakistan's government that the meeting had actually taken place (Clary, 2025). Whether this was a real change of course or possibly an effort to speed up the U.S.-led efforts at de-escalation, and/or a communications failure during a rapidly unfolding crisis, stays unclear. One thing that can be safely assumed is that the episode coincided with a distinct increase in the diplomatic efforts of the United States, and could be seen as an attempt on the part of Pakistan to leverage the impression of nuclear-command capability to serve a diplomatic purpose, rather than as any real effort to utilize nuclear arms.

More generally, there has been a re-evaluation of both sides' doctrinal positions after the crisis. The fact that Operation Sindoor went on for four days without nuclear signaling or scenario or response is proof that Pakistan's well-known nuclear policy of 'deliberately ambiguous deter-

rence' to staunch any Indian bleeding from a conventional war has waned and that total deterrence is no longer in vogue (Ladwig, 2025; Pant & Patil, 2025). This reading is rejected in the Pakistani commentaries, in Kazmi (2025), who argues that at the minimum, nuclear deterrence did not erode, but that on the contrary, continued nuclear deterrence offers the best explanation as to why India stopped escalating its apparent conventional advantage and finally accepted a cease-fire. This reading is consistent with the doctrinal logic Kurita (2025) attributes to Pakistan's post-2017 layering of limited nuclear options onto full-spectrum deterrence: the purpose of such options is not necessarily their use, but the maintenance of sufficient ambiguity that an adversary cannot be certain any given level of conventional pressure remains safely below the threshold at which they might be employed. Read this way, the absence of a Pakistani nuclear response to Operation Sindoor is as consistent with successful ambiguity-based deterrence as with its erosion, underscoring the genuinely contested character of this question first identified in Section 2, and revisited through the deterrence/compellence lens in Section 7.

Escalation Control Mechanisms

Indian military leadership described its intra-crisis targeting decisions as governed by a cross-service escalation-control mechanism intended to calibrate the scale and domain of each successive response to the preceding Pakistani action (Clary, 2025). Evidence for this mechanism includes India's repeated emphasis, in daily official briefings, that its responses were 'proportionate' and confined to 'the same domain' as the provocation being answered, along with its statement of continued commitment to non-escalation 'provided it is reciprocated' on the morning of 10 May. Pakistan, for its part, appears to have similarly sought to demonstrate proportionality to perceived Indian escalation, launching its most intensive missile and drone salvo only after India's expanded strikes of 9–10 May.

The general pattern supports a qualified version of the paradox's stabilizing expectation, with both states declaring and largely implementing an internally coherent logic of calibration. But the Kirana Hills rumor, the disputed National Command Authority announcement, and the mutual misperception surrounding the 7–8 May drone exchange each suggest that de-escalation resulted not only from each side's independent operation of an escalation-management doctrine, but also from mutual restraint and, at key moments, decisive third-party intervention.

Third-Party Diplomacy

United States diplomacy played the decisive role in bringing the crisis to an end. Initial American statements, including Vice President Vance's remark that the confrontation was 'not our business,' gave way within roughly twenty-four hours to direct, high-level engagement, as reporting suggests that a shift in U.S. intelligence assessments raised concern about the likelihood of dramatic escalation (Clary, 2025). American officials engaged an unusually broad set of interlocutors, from Pakistan's army chief to India's external affairs minister, departing from previous diplomatic red lines. When President Trump announced the ceasefire before either government had done so itself, India responded sharply, signaling for the first time that it would not accept being bound to Pakistani preferences for negotiations over a 'broad set of issues' at a 'neutral site' (Clary, 2025). Other states, including Iran and Saudi Arabia, conducted parallel diplomatic efforts whose independent effect on the outcome remains unclear but may have reinforced pressure on Pakistan.

The research on doctrinal literature analyzed in Section 2 has considered the India-Pakistan nuclear relationship more in a bilateral context; American mediation has received relatively little sustained theory. This implies that there is a structural component to South Asian strategic stability along with bilateral deterrence: Durable crisis termination in this rivalry has also repeatedly been reliant on an external interlocutor with credibility and capability to communicate with both capitals in cases where direct channels are stressed or doomed to fail. This dependence can be treated as a third pillar of South Asian strategic stability, alongside the two more familiar ones — mutual nuclear deterrence and bilateral escalation control — and the article suggests that future doctrinal analysis of the paradox in this dyad should incorporate it explicitly.

Strategic Stability Implications

Overall, the crisis has set strategic stability in South Asia in a different condition as compared to the pre-crisis era. 2021 witnessed a crisis in the Line of Control, which, even prior to the Pahalgam attack, had been under strain since 2021 due to an informal ceasefire arrangement. Both governments' claims of victory, which are based on mutually contradictory public pronouncements of wins and losses, suggest that neither side has changed the central understanding of the other's will or capacity — a dynamic that, in the past, rather than a cure for it, has marched toward future trouble in the rivalry. Simultaneously, the Pakistani side now has a smorgasbord of Indian standoff-strike options; the territory on which a future India-Pakistan clash will take place will be different thanks to all available drone-based warfare, and the material of the Pakistani side has also changed with the introduction of advanced China-origin air-defense and air-combat systems.

Discussion

The analysis equates with qualified support for the use of the stability/instability paradox for the May 2025 crisis. The drone, air & missile warfare between the two was four days in duration, yet without any explicit signaling at the nuclear level and deliberate targeting of population centers, thereby 'Mutually Deterrent' at the strategic level actually allowed the most extensive conventional attacks against the Pakistani space since 1971. This looks like the extension of space for calibrated conventional coercion that does not signal its collapse; rather, it signaled the extension of space under an unbroken nuclear ceiling, in this case interpreted as in the Indian-origin literature (Tarapore, 2025; Ladwig, 2025; Pant & Patil, 2025).

The analysis also confirms the Pakistani-origin literature's worry (Kazmi, 2025; ISSI, 2025) for the fragility of that balance, albeit not with the same motivations as it does. This doesn't necessarily have to be a failure of deterrence, for the mere use of force is at least as consistent with the success of such a strategy, albeit imperfectly calibrated, as with the deterrence being undermined, especially given that India ultimately refrained from targeting any of its rivals and accepted a ceasefire. What the evidence more clearly supports is a narrower but still important point: several moments in the crisis — the misperceived proportionality following the 7–8 May drone exchange, the unsubstantiated but widely credited Kirana Hills rumor, and the contested National Command Authority announcement — could plausibly have escalated beyond either side's intended limits had circumstances unfolded only slightly differently." In the case of the deterrence/compellence question posed in Section 3, the evidence in May 2025 cannot clearly favor one reading over the other: the crisis delivers a mix of restraint-plus-expansion, both a deterrence/restoration motivation and a compellence motivation are viable; and it would be difficult

to adjudicate the question without information on intentions, which is not included in the open-source record. What the paradox does allow this article to conclude is that nuclear deterrence, in this case, made deliberate escalation more difficult without correspondingly reducing — and in some respects increasing — the risk of inadvertent escalation driven by misperception, in an environment marked by pervasive disinformation and rapid, technologically enabled strike-counterstrike cycles.

These observations also suggest that there is a lacuna in the doctrinal literature referenced in Section 2, which has tended to see the India–Pakistan nuclear relationship as a bilateral one. The three pillars of stable–unstable equilibrium for the region are thus contemporary checks against a nuclear arms race: mutual nuclear deterrence, calibrated bilateral escalation control, and credible external mediation capabilities, with the latter coming into greater prominence as a key element of the equilibrium because United States diplomacy indeed was instrumental in ending the crisis. That this third pillar appears vulnerable in a way, for instance, in America's early reluctance to intervene, as well as in intelligence estimates that reversed only late on, brings another layer of contingency which none of these bilateral reductionist versions of the paradox can account for.

All of these findings rely on an unchallenged evidentiary record. As they stand in this open-source article, the chronology is subject to change as new open-source evidence and/or forensics are found to support or contradict specific events, especially the reported Indian loss of aircraft and extent of damage to Pakistani airbases. The caveat, however, does not affect the theoretical argument of the article that focuses on a broad pattern of escalation, as mediated by partial calibration and imperfect understanding of situations, but not the resolution of a specific disputed factual claim.

Conclusion

This article analyzed the impact of the India – Pakistan military clash in May 2025 and its impact on regional strategic stability in the context of mutual nuclear deterrence. Analyzing this crisis from a qualitative, single-case perspective and through the lens of the stability – instability paradox and a rival 'compellence-based explanation', the analysis reveals that the crisis generally supports the core logic behind the stability instability paradox: that at the strategic level, nuclear deterrence allowed and did not prevent a level of conventional confrontation that had never been seen before, even though both states were capable of using their nuclear weapons.

The article makes two key contributions at the theoretical level. First, it indicates that the stabilizing logic implicit in the paradox is heavily dependent on the accuracy of how far each side adheres to their end of the non-aggression pact in this instance, by downplaying their own activities and by not being informed about the rumors or ambiguous official statements by the other side. Second, in a more novel fashion in the context of this case, it delineates durable third-party mediation as a key structure of South Asian strategic stability itself and not a mere sub-cat of bilateral nuclear deterrence and escalation control.

There are three policy implications. First, the restoration of a durable ceasefire mechanism along the Line of Control, which is already broken and has been in place since 2021, would at least alleviate one of the existing and sustained contentions. More significantly, the crisis highlights the ongoing, albeit erratic, need for credible third-party crisis-management facilities, pointing to the need for further consideration of communication channels between the parties formalized or

semi-formalized with external interlocutors, particularly by policymakers in both New Delhi and Islamabad, but also in Washington. Third, the demonstrated risk of misperception amid disinformation suggests that bilateral or third-party-facilitated mechanisms for rapid, credible fact verification during future crises could materially reduce escalation risk independent of any change to either state's declared doctrine.

Future research should pursue three directions as further primary evidence becomes available. First, more rigorous forensic and satellite-imagery analysis, potentially informed by future declassification, should be used to resolve the contested factual questions identified in this article, particularly regarding aircraft losses and battle-damage assessment. Second, comparative analysis of the May 2025 crisis alongside other recent instances of drone-intensive, technologically asymmetric conflict, including the Russia–Ukraine and Armenia–Azerbaijan wars, could clarify whether the escalation-management challenges identified here are specific to the India–Pakistan nuclear dyad or reflect a more general feature of contemporary precision-strike warfare. Third, sustained monitoring of the doctrinal and procurement responses of both India and Pakistan in the crisis's aftermath will be necessary to assess whether the altered material and technological baseline identified in this article increases or decreases the probability and severity of the rivalry's next crisis.

References

1. Al Jazeera. (2025, May 7). India launches Operation Sindoor, exchanges heavy fire with Pakistan. <https://www.aljazeera.com/news/2025/5/6/india-launches-attacks-on-several-sites-in-pakistan>
2. Bashir, S. (2022). The China–India–Pakistan nuclear triangle: Consequential choices for Asian security. *Journal for Peace and Nuclear Disarmament*, 5(2), 336–349. <https://doi.org/10.1080/25751654.2022.2141053>
3. Carnegie Endowment for International Peace. (2025, October 6). Military lessons from Operation Sindoor. <https://carnegieendowment.org/research/2025/10/military-lessons-from-operation-sindoor>
4. Clary, C. (2025, May 28). Four days in May: The India-Pakistan crisis of 2025 (Working Paper). Stimson Center. <https://www.stimson.org/2025/four-days-in-may-the-india-pakistan-crisis-of-2025/>
5. Colby, E. A., & Gerson, M. S. (Eds.). (2013). *Strategic stability: Contending interpretations*. Strategic Studies Institute and U.S. Army War College Press.
6. Institute of Strategic Studies Islamabad. (2025, May 28). The future of deterrence and emerging challenges [Seminar remarks]. <https://issi.org.pk/ad-nca-chief-guest-the-future-of-deterrence-and-emerging-challenges-issi-seminar/>
7. Kahn, H. (1965). *On escalation: Metaphors and scenarios*. Praeger. [Source for the escalation-ladder concept applied throughout Section 6.]
8. Kazmi, Z. (2025, July 24). In defense of deterrence: Why India's Operation Sindoor marks a dangerous drift toward compellence. *CISS Strat Review*, Centre for International Strategic Studies. <https://ciss.org.pk/ciss-strat-review-in-defence-of-deterrence-why-indias-operation-sindoor-marks-a-dangerous-drift-toward-compellence/>
9. King, G., Keohane, R. O., & Verba, S. (1994). *Designing social inquiry: Scientific inference in qualitative research*. Princeton University Press.

10. Kristensen, H. M., Korda, M., & Johns, E. (2023). Pakistan nuclear weapons, 2023. *Bulletin of the Atomic Scientists*, 79(5), 329–345. <https://doi.org/10.1080/00963402.2023.2245260>
11. Kurita, M. (2025). The deterrent logic of limited nuclear options: A case study of Pakistan. *Journal of Strategic Studies*. Advance online publication. <https://doi.org/10.1080/01402390.2025.2543864>
12. Ladwig, W. (2025, May 21). Calibrated force: Operation Sindoor and the future of Indian deterrence. Royal United Services Institute. <https://www.rusi.org/explore-our-research/publications/commentary/calibrated-force-operation-sindoor-and-future-indian-deterrence>
13. Narejo, G. S., & Khan, Z. (2024). Pakistan's ambiguous nuclear doctrine: Prima facie deterrence aimed at war avoidance. *Strategic Thought*, 41–56. National Defence University, Islamabad.
14. Pant, H. V., & Patil, S. (Eds.). (2025). In the aftermath of Operation Sindoor: Escalation, deterrence, and India-Pakistan strategic stability (ORF Special Report No. 263). Observer Research Foundation. <https://www.orfonline.org/research/in-the-aftermath-of-operation-sindoor-escalation-deterrence-and-india-pakistan-strategic-stability>
15. Schelling, T. C. (1966). *Arms and influence*. Yale University Press. [Original source for the coercive-bargaining logic underlying deterrence and compellence as applied in Section 6.1.]
16. Tarapore, A. (2025, May 19). Operation Sindoor and the evolution of India's military strategy against Pakistan. *War on the Rocks*. <https://warontherocks.com/2025/05/operation-sindoor-and-the-evolution-of-indias-strategy-against-pakistan/>
17. Waltz, K. N. (1981). The spread of nuclear weapons: More may be better (Adelphi Papers No. 171). International Institute for Strategic Studies. [Original source for the stability–instability paradox adopted as this article's theoretical framework in Section 3.]
18. White, J. T. (2025, May 14). Lessons for the next India-Pakistan war. Brookings Institution. <https://www.brookings.edu/articles/lessons-for-the-next-india-pakistan-war/>