



KASHMIR & THE NEW BALANCE OF POWER IN SOUTH ASIA

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Photo: A meeting between the foreign ministers of China and Pakistan, ten days after the signing of the India-Pakistan ceasefire. Credit: Pakistan's Ministry of Foreign Affairs

In response to the April 22 attacks, which claimed the lives of 25 Indian nationals & one Nepali citizen in the Pahalgam town of Indian-administered Kashmir, India's Armed Forces carried out [Operation Sindoor](#) on May 7, 2025, hitting nine sites of "terrorist infrastructure" within Pakistan and Pakistan-administered Kashmir. The resulting 87-hour standoff, [costing \\$1 billion an hour](#) combined for both nations, came to a close on Saturday, May 10, following U.S. President Donald Trump's negotiated ceasefire, which has been holding well given the [exchange of detained soldiers](#) the following Wednesday, May 14. While India's strikes were on a bigger scale than the most recent 2019 Pulwama incident, representing the [first time India's Army, Navy & Air Force attacked](#)

[at once since 1971](#), Pakistan's response in shooting down multiple Indian jets has also set been unprecedented, taking the two nuclear-powered South Asian rivals to a new level of brinkmanship under the nuclear shadow. U.S. and E.U. [arms sales](#) to India, as well as China's arms sales to Pakistan, over the last decade signal new realignments. This decisive shift in the region's balance of power is also evident in diplomacy and economic statecraft.

Recent [satellite images](#) show India attacked 26 sites in Pakistan, killing 11 Pakistani soldiers. In comparison, Pakistan attacked 24 sites and killed five Indian soldiers, but more significantly, [shot down](#) six French-origin Rafale aircraft operated by India with their Chinese J-10C aircraft. According to the Stockholm International Peace Research Institute (SIPRI), [81% of Pakistan's arms](#) between 2020 and 2024 came from China. This air superiority led to a 36% surge in China's defense stocks following Operation Sindoor, but a subsequent [8.5% slump](#) after the U.S.-brokered ceasefire. While Russia has traditionally been India's largest arms supplier, accounting for 58% of its defense imports since 2008, the U.S. has encouraged India to [reduce](#) its Russian defense imports to 36% since 2020. Earning its designation as a "Major Defense Partner" with the U.S. in 2016, India has [diversified](#) its defense imports with 33% coming from France, 13% from the U.S., and 9% from Israel.

More recently, on Wednesday, June 18, a lunch [meeting](#) between U.S. President Donald Trump and Pakistan Army Chief Asim Munir signaled a deepening of the U.S.-Pakistan relationship. This new rapport stems not only from recognition of Pakistan's performance against India and the ceasefire, which Trump mentions in light of the ongoing Iran-Israel conflict to burnish his peace-maker credentials at odds with the [Indian narrative](#), but also from critical minerals, crypto deals and counterterrorism. As the third Pakistani Army Chief to meet with a U.S. President, [following General Zia and General Musharraf](#), Pakistan's post-Pahalgam gains have been undeniable. This new episode of U.S.-Pakistan rapprochement allegedly also focused on the need to mediate with Iran and attempt to urge Islamabad to distance itself from China's court, which has been a key partner to Pakistan in recent years, with significant influence in South Asia as a regional power. At the

same time, India struggles with optics and exposed limitations in relation to their [two-front dilemma](#) with Pakistan & China after the recent conflict.

Components of the Collapse of a Fragile Peace in Kashmir

Kashmir has been a flashpoint for conflict between India and Pakistan since 1947, but once [observed a fifteen-year relative peace](#) following India's victory in the 1971 Bangladesh Liberation War—the only one of the four Indo-Pakistani wars not fought over Kashmir. In addition to the independence of Bangladesh, the 1971 war resulted in the signing of the 1972 [Simla Agreement](#), which established the Line of Control (LoC), separating Kashmir into Pakistan-administered Kashmir and India-administered Kashmir. 1971 also marked [India's emergence as the victorious hegemon](#) in South Asia, resulting in a U.S. retreat from the subcontinent as the erstwhile Nixon administration, resolutely backed Pakistan at the time, and a strategic step back for China, which supported Pakistan to consolidate its gains following Beijing's 1962 victory over India.

The lines drawn since 1971 have changed since the U.S. and India have increasingly [aligned](#) away from the Cold War-era, [Indo-Soviet relationship](#). Today, India is a key partner to the U.S. in its [Indo-Pacific strategy](#) to contain China's rise as a member of the Quad while actively engaging with Washington in the realms of military cooperation, diplomatic relations and political alignment. Meanwhile, China and Pakistan's [“iron brotherhood”](#) since signing the Treaty of Friendship in 1956 has witnessed dividends return as Beijing's Belt and Road Initiative (BRI) expands and arms sales surge. As the home of the \$62 billion [China-Pakistan Economic Corridor](#) (CPEC), China's most expensive and ambitious Belt and Road Initiative (BRI) project, Pakistan has extensive ties to China, which Islamabad views as an indispensable counterweight to India in South Asia. However, Trump's recent invitation to the Pakistan Army Chief Munir for a White House lunch challenges any sense of clearly defined US-China blocs. Raza Ahmad Rumi, a distinguished lecturer at the City University of New York, argues that the meeting wasn't just “protocol-breaking, it's protocol-redefining.”

Ashley J. Tellis, a renowned scholar on U.S. defense and foreign policy in South Asia, writes in his [book](#), *Striking Asymmetries: Nuclear Transitions in Southern Asia*, on how China and Pakistan are increasingly positioned as partners in their opposition toward India. The parallelism between the two dyads—India vis-à-vis China and Pakistan vis-à-vis India—has the weaker state far more concerned about the stronger, while the stronger entity remains fixated on keeping the weaker state in its strategic field of view. The recent escalation over Kashmir in 2025 confirms Tellis's framing of Pakistan and China's opposition to India in security conflicts in South Asia. Pakistan's [proxy networks under its nuclear umbrella](#) and [“all-weather” relationship with China](#) present a persistent and capable challenge to not just India but the U.S.-led Quad, whose mission to operate as a coalition of democracies to counterbalance China has [arguably failed](#).

The China-Pakistan Nexus Seizes an Opportunity in New Delhi's Decline in Influence

A key difference between earlier episodes of Indo-Pakistani brinkmanship and the ongoing post-Pahalgam episode is the [decline of New Delhi's sphere of influence in South Asia](#). Of the eight countries in South Asia, six are [integrated within China's BRI](#), having gained momentum in the last decade. For instance, in 2023, the Maldives elected Prime Minister Muhammad Muizzu on an “India Out” campaign and grew [closer to China](#), signing 20 agreements in January 2024. In Sri Lanka, Prime Minister Anura Dissanayake, elected in 2024, further signed 15 cooperation agreements with China in January 2025. This followed Beijing's [role as the country's largest lender](#), resulting from the \$1.4 billion Hambantota Port lease for 99 years in 2017. Most notably, the ousting of Sheikh Hasina in Bangladesh in August 2024 has [resulted in an unprecedented thaw](#) in relations between Dhaka and Islamabad as well as a rise in economic cooperation between Beijing and Dhaka under Muhammad Yunus's interim government. During Yunus's recent visit to China from March 26 to March 29, he [signed](#) nine agreements and MoUs, which included the establishment of a new China Industrial Economic Zone, modernization of the Mongla Port and Beijing's support for a 50-year plan for Bangladesh's river management that

would undermine India's prior agreements with Bangladesh under Hasina.

As part of his 2014 campaign, Modi declared the seven South Asian neighboring countries a priority by envisioning a [“Neighborhood First Policy”](#) to lead in trade interconnectivity in the region. Xavier Constantino, a Fellow at the Center of Social and Economic Progress (CSEP), designates the [geostrategic response to China](#) as the most important driver for India's new connectivity strategy. However, India's trade interconnectivity in South Asia stands at a mere 5% due to the inability to deliver on infrastructure projects and a lack of capital relative to China, while Southeast Asia under ASEAN stands at a remarkable 30%. India's External Affairs Minister, S. Jaishankar, referred to South Asia as the “first circle of priority.” However, diplomatic fallouts, political tensions with neighboring countries and a lack of economic heft led to this lofty goal left unrealized a decade later.

Ultimately, India and Pakistan's decisions to escalate have many domestic influences and incentives in order to consolidate the incumbent Sharif and Modi regimes' grip on power. However, the long game of U.S.-China strategic competition in the region, demonstrated in [Pakistan's use of PL-15 missiles](#) and [J-10C](#) fighter jets during the escalation, as well as India's 2023 [INDUS-X milestone agreement](#) for co-development of U.S. & Indian defense systems, points to South Asia's ongoing role as a battlespace between the two regional rivals. This escalation has shown that India-Pakistan tensions won't subside as quickly as in previous confrontations. Still, it will not be the last, given its demonstration of the China-Pakistan nexus as a formidable disruptive force against the emerging, but not binding, U.S.-India alliance.

Trump's embrace of Pakistan in a closed-door meeting signals a reset of U.S.-Pakistan relations at a time when such diplomacy can greatly benefit not only bilateral relations, but also balance China and bring Iran to the table while bypassing India's role as a preferred partner and lens with which Washington has traditionally looked to South Asia. The Trump-Munir meeting may mark a turning point, where Washington finally heeds the call of many South Asia analysts, such as Rabia Akhtar, a

Visiting Scholar at Harvard's Belfer Center, to [confirm Pakistan's role](#) as a crisis stabilizer and responsible nuclear actor, rather than the prior [hyphenated](#) view of India-Pakistan relations. As a result of recent developments in Kashmir, South Asia's balance of power has tilted toward the China-Pakistan nexus, arguably shattering India's long-held upper hand in the region, which will be of ongoing concern to Washington.