

| Flash |

What Is Next in the India-Pakistan Conflict

F-2025-05-27a

Classification: TLP:CLEAR

Criticality: Low

Intelligence Requirements: Geopolitical

May 27, 2025

Scope Note

ZeroFox Intelligence is derived from a variety of sources, including—but not limited to—curated open-source accesses, vetted social media, proprietary data sources, and direct access to threat actors and groups through covert communication channels. Information relied upon to complete any report cannot always be independently verified. As such, ZeroFox applies rigorous analytic standards and tradecraft in accordance with best practices and includes caveat language and source citations to clearly identify the veracity of our Intelligence reporting and substantiate our assessments and recommendations. All sources used in this particular Intelligence product were **identified prior to 6:30 AM (EDT) on May 27, 2025**; per cyber hygiene best practices, caution is advised when clicking on any third-party links.

| Flash | What Is Next in the India–Pakistan Conflict

| Key Findings

- Tensions between India and Pakistan are likely to simmer in the short term, with sporadic violations of the ceasefire agreement across the northern and western border regions of India.
- In the event of future conflicts, India is likely to strike Pakistani government and military infrastructure rather than only remote terrorist infrastructure, as it has done in the past.
- India is very likely to use the Indus Water Treaty (IWT) with Pakistan as a weapon of conflict—or at least leverage it—in future relations with Pakistan. There is a roughly even chance that the IWT will become the cause of new escalations.
- India and Pakistan are likely to see developments in existing trade arrangements with each other and their trading partners in countries such as China, Turkey, and the United States.

| Details

Tensions between India and Pakistan, which flared following a terrorist attack on April 22 that killed approximately 26 people in the long-disputed region of Kashmir,¹ are likely to simmer in the short term, with political posturing, cross-border rhetoric, and occasional

¹ ZeroFox Intelligence Flash Report: India–Pakistan Tensions Likely to Escalate, April 29, 2025

ceasefire violations shaping the security landscape. A full-scale escalation remains unlikely. However, increased friction along the Line of Control (LoC), a military control line that passes through Kashmir that was originally considered to be a ceasefire line between the two countries, is very likely.

On May 10, 2025, after intense military hostilities, Indian External Affairs Minister S. Jaishankar announced that the two countries had agreed to cease fighting.² Despite the ceasefire agreement, fire exchanges across the borders and LoC are likely in the short term. India and Pakistan are likely to conduct espionage and other more targeted military operations against each other, striking strategic bases; each country has already accused the other of violating the ceasefire pact.

- Soon after the ceasefire announcement, reports emerged of cross-border firing from Pakistan at various locations along the Jammu border.³ The Indian Foreign Secretary, Vikram Misri, accused Pakistan of repeated ceasefire violations.
- Responding to these allegations, Pakistan's foreign ministry asserted that the country was committed to holding up the ceasefire and blamed India for violating the agreement.⁴

In response to the April 22 attacks, India's Operation Sindoor (an armed operation against terrorist infrastructure in Pakistan and Jammu and Kashmir) struck locations inside Pakistan's territory beyond those in the disputed region of Kashmir.⁵ Indian Defence Minister Rajnath Singh said that Operation Sindoor is not yet over despite the ceasefire,⁶ which indicates there is a continued risk of the conflict resuming. The strategic operation introduced other significant shifts in Indian policy, specifically in response to terror attacks originating from Pakistan.

2

[hXXps://www.thehindu\[.\]com/news/national/operation-sindoor-pahalgam-attack-india-pakistan-ceasefire-live-updates-may-11-2025/article69563302.ece](https://www.thehindu.com/news/national/operation-sindoor-pahalgam-attack-india-pakistan-ceasefire-live-updates-may-11-2025/article69563302.ece)

³ [hXXps://x\[.\]com/OmarAbdullah/status/1921228736776527917](https://x.com/OmarAbdullah/status/1921228736776527917)

⁴ [hXXps://www.bbc\[.\]com/news/live/cwy3jnl3nvw7](https://www.bbc.com/news/live/cwy3jnl3nvw7)

⁵ [hXXps://www.pib\[.\]gov\[.\]in/PressReleasePage.aspx](https://www.pib.gov.in/PressReleasePage.aspx)

6

[hXXps://www.livemint\[.\]com/news/india/operation-sindoor-not-over-yet-was-just-a-trailer-defence-rajnath-singhs-big-warning-to-pakistan-11747380000121.html](https://www.livemint.com/news/india/operation-sindoor-not-over-yet-was-just-a-trailer-defence-rajnath-singhs-big-warning-to-pakistan-11747380000121.html)

- Indian Prime Minister Narendra Modi's speech on May 12, 2025, highlighted three policies for India's security doctrine: 1) Any terrorist attack on India will be met with a military response; 2) India will not tolerate or back down in the event Pakistan threatens to use nuclear weapons; and 3) India will attribute any attack originating from Pakistan to the Pakistani government, even if it was planned and carried out by terrorists with no identifiable links to the Pakistani government.⁷ These three policies will very likely determine India's response to any future terror attacks coming from Pakistan.
- With Operation Sindoor, India has established a military precedent that it will target government and military infrastructure in response to terror attacks originating from Pakistan. This is in contrast to previous episodes of conflict, when India responded on a smaller scale and only targeted terrorist infrastructure.
- Having already struck terrorist headquarters like Muridke and Bahawalpur, India is likely to target unconventional sites within Pakistan during future strikes, including intelligence, military, or urban locations.

Non–Military Retaliation

India has begun using a number of non-military responses to keep pressure on Pakistan. New Delhi put the IWT with Pakistan in abeyance in the immediate aftermath of the Pahalgam terror attack, stopping short of completely abandoning it.⁸ India is very likely to use the IWT as a weapon of conflict—or at least leverage it—in future relations with Pakistan. There is a roughly even chance that the IWT will become the cause of new escalations that include military actions, as Islamabad has already deemed blocking or diverting water from this basin to be an act of war.⁹

- In the short term, New Delhi is likely to continue to withhold information on river-flow, which will adversely impact Pakistan's irrigation planning and disaster preparedness.

⁷ [hXXps://www.pib\[.\]gov\[.\]in/PressReleaseDetailm.aspx?PRID=2128270](https://www.pib.gov.in/PressReleaseDetailm.aspx?PRID=2128270)

⁸

[hXXp://thehindu\[.\]com/news/national/indus-waters-treaty-will-remain-in-abeyance-till-pakistan-stops-cross-border-terrorism-india/article69606751.ece](https://thehindu[.]com/news/national/indus-waters-treaty-will-remain-in-abeyance-till-pakistan-stops-cross-border-terrorism-india/article69606751.ece)

⁹

[hXXps://www.abc\[.\]net\[.\]au/news/2025-04-25/pakistan-warns-india-indus-water-treaty-changes-act-of-war/105214372](https://www.abc[.]net[.]au/news/2025-04-25/pakistan-warns-india-indus-water-treaty-changes-act-of-war/105214372)

- In the long term, India is very likely to construct storage dams on Chenab River, part of the Indus river basin, which will enable its government to hold back water. India is reportedly fast-tracking the construction of at least four run-of-water hydro projects on the river.¹⁰
- Pakistan's Minister of Defence, Khawaja Asif, has threatened that Islamabad will strike any structure built by India on the Indus River that violates the treaty.¹¹ The Indus Basin provides nearly 80 percent of downstream Pakistan's agricultural needs, with tens of millions of people dependent on the sector.¹²

China is also in a position to control the flow of rivers in the Indus river basin, as key rivers like the Indus and Sutlej originate in Tibet.

- There is a roughly even chance of China manipulating water flow to the Indus river basin or the Brahmaputra River (Yarlung Tsangpo in China) if India uses the IWT as a weapon against Pakistan. Beijing has previously withheld Brahmaputra river-flow data from India during various conflicts.¹³

Trade and Travel Disruptions

India and Pakistan's travel bans against each other are already disrupting air cargo, with both countries closing their airspace. Flights are taking longer routes, which could lead to higher fuel costs and delivery delays going forward. If this continues, global shipping—especially for e-commerce and perishable goods—is likely to become slower and more expensive.

- India imposed measures against Pakistan that include a full import ban, denial of port access, and closure of its airspace to Pakistani aircraft. Pakistan temporarily

¹⁰

[hXXps://www.reuters\[.\]com/world/asia-pacific/india-advances-kashmir-hydro-projects-after-suspending-pact-with-pakistan-2025-05-06/](https://www.reuters.com/world/asia-pacific/india-advances-kashmir-hydro-projects-after-suspending-pact-with-pakistan-2025-05-06/)

¹¹

[hXXps://www.hindustantimes\[.\]com/india-news/will-strike-any-structure-they-build-pak-defence-minister-khawaja-asif-threat-india-indus-waters-treaty-101746266474513.html](https://www.hindustantimes.com/india-news/will-strike-any-structure-they-build-pak-defence-minister-khawaja-asif-threat-india-indus-waters-treaty-101746266474513.html)

¹²

[hXXps://www.chathamhouse\[.\]org/2025/05/urgent-mediation-save-indus-waters-treaty-could-be-route-de-escalation-between-india-and](https://www.chathamhouse.org/2025/05/urgent-mediation-save-indus-waters-treaty-could-be-route-de-escalation-between-india-and)

¹³ [hXXps://time\[.\]com/4951207/how-china-could-weaponize-water/](https://time.com/4951207/how-china-could-weaponize-water/)

closed its airspace to civil flights but reopened it after the ceasefire announcement.¹⁴

- Most international airlines had already rerouted to avoid Pakistani airspace, which was seeing limited commercial activity. Airspace restrictions are near India's western borders, affecting long-haul international flights.¹⁵

Trade restrictions between India and Pakistan are likely to push Pakistan to seek new trade relationships with other countries and solidify its existing one with China. Pakistan is more dependent on trade with India than vice versa, importing Indian goods worth USD 1.2 billion in the financial year of 2024. India imported only USD 3 million worth of goods from Pakistan, indicating a one-sided trade dependency.¹⁶

- Currently, Pakistan and China have agreed to deepen trade and investment ties in security, agriculture, and industrialization. They have also pledged to accelerate the upgraded phase of the China-Pakistan Economic Corridor (CPEC), a key part of China's Belt and Road Initiative involving USD 65 billion in investments.¹⁷

As Pakistan moves further away from India economically, it is likely to become reliant on other countries—not just for trade but also for funding and military backing.

Turkey has extended military support to Pakistan, including advanced drone technology. This support very likely took the form of Turkish-made drone intrusions across India's northern and western borders on May 8, 2025.¹⁸

¹⁴

[hXXps://www.livemint\[.\]com/news/india-shuts-airspace-for-pakistan-run-flights-military-aircraft-till-23-may-in-pahalgam-terror-attack-aftermath-11746032897845.html](https://www.livemint.com/news/india-shuts-airspace-for-pakistan-run-flights-military-aircraft-till-23-may-in-pahalgam-terror-attack-aftermath-11746032897845.html)

¹⁵

[hXXps://aviationtoday\[.\]in/news/moca/indian-airlines-raise-concerns-as-airspace-closures-disrupt-international-flights/](https://aviationtoday[.]in/news/moca/indian-airlines-raise-concerns-as-airspace-closures-disrupt-international-flights/)

¹⁶

[hXXps://www.hindustantimes\[.\]com/india-news/pakistan-suspends-trade-with-india-effect-on-india-to-be-minimal-101745522580535.html](https://www.hindustantimes.com/india-news/pakistan-suspends-trade-with-india-effect-on-india-to-be-minimal-101745522580535.html)

¹⁷

[hXXps://www.hindustantimes\[.\]com/world-news/amid-tensions-with-india-pakistan-china-agree-to-deepen-trade-maintain-close-communication-101747805970600.html](https://www.hindustantimes.com/world-news/amid-tensions-with-india-pakistan-china-agree-to-deepen-trade-maintain-close-communication-101747805970600.html)

¹⁸

[hXXps://www.firstpost\[.\]com/explainers/turkey-pakistan-strategic-alliance-history-india-operation-sindoor-13887305.html](https://www.firstpost.com/explainers/turkey-pakistan-strategic-alliance-history-india-operation-sindoor-13887305.html)

Turkey has expressed political and military support for Pakistan, for which India has responded by boycotting Turkish products and services. If India–Pakistan tensions lead to sustained airspace closures, flights transiting through Turkish airspace or operated by its airlines could be rerouted or affected.

- On May 15, 2025, India terminated agreements with Turkish firm Çelebi at major airports (including Mumbai, Ahmedabad, and Delhi) following the revocation of Çelebi's security clearance over alleged support for Pakistan.¹⁹
- India's boycott of Turkish products and services targets a wide range of goods, including consumer items. Major Indian retailers, like Flipkart's Myntra and Reliance's AJIO, have removed popular Turkish apparel brands. Additionally, Indian tourism to Turkey has sharply declined.²⁰

| Conclusion

The recent clash between India and Pakistan was the most significant military escalation in decades between the two nuclear entities. While the ceasefire currently remains in effect, both nations continue to exert pressure through non-military strategies, including the strategic use of water resources, trade restrictions, and travel bans. These actions are likely to influence bilateral relationships in the coming months, as well as impact India and Pakistan's trading partners, such as China, Turkey, and the United States.

¹⁹

[hXXps://www.livemint\[.\]com/news/india/after-delhi-mumbai-and-ahmedabad-airports-end-contracts-with-elebi-amid-boycott-turkey-call-staff-to-be-transferred-11747353386698.html](https://www.livemint.com/news/india/after-delhi-mumbai-and-ahmedabad-airports-end-contracts-with-elebi-amid-boycott-turkey-call-staff-to-be-transferred-11747353386698.html)

²⁰

[hXXps://timesofindia.indiatimes\[.\]com/business/international-business/how-indias-boycott-of-turkish-products-services-may-aggravate-turkeys-dire-economic-state/articleshow/121314302.cms](https://timesofindia.indiatimes.com/business/international-business/how-indias-boycott-of-turkish-products-services-may-aggravate-turkeys-dire-economic-state/articleshow/121314302.cms)

| Appendix A: Traffic Light Protocol for Information Dissemination

WHEN SHOULD IT BE USED?

Red

Sources may use

TLP:RED when information cannot be effectively acted upon by additional parties and could lead to impacts on a party's privacy, reputation, or operations if misused.

Amber

Sources may use

TLP:AMBER when information requires support to be effectively acted upon but carries risks to privacy, reputation, or operations if shared outside of the organizations involved.

HOW MAY IT BE SHARED?

Recipients may NOT share

TLP:RED with any parties outside of the specific exchange, meeting, or conversation in which it is originally disclosed.

Recipients may ONLY share

TLP:AMBER information with members of their own organization and its clients, but only on a need-to-know basis to protect their organization and its clients and prevent further harm.

Note that

TLP:AMBER+STRICT restricts sharing to the organization only.

Green

WHEN SHOULD IT BE USED?

Sources may use

TLP:GREEN when information is useful for the awareness of all participating organizations, as well as with peers within the broader community or sector.

Clear

Sources may use

TLP:CLEAR when information carries minimal or no risk of misuse in accordance with applicable rules and procedures for public release.

HOW MAY IT BE SHARED?

Recipients may share

TLP:GREEN information with peers and partner organizations within their sector or community but not via publicly accessible channels.

Recipients may share

TLP:CLEAR information without restriction, subject to copyright controls.

| Appendix B: ZeroFox Intelligence Probability Scale

All ZeroFox intelligence products leverage probabilistic assessment language in analytic judgments. Qualitative statements used in these judgments refer to associated probability ranges, which state the likelihood of occurrence of an event or development. Ranges are used to avoid a false impression of accuracy. This scale is a standard that aligns with how readers should interpret such terms.

Almost No Chance	Very Unlikely	Unlikely	Roughly Even Chance	Likely	Very Likely	Almost Certain
1-5%	5-20%	20-45%	45-55%	55-80%	80-95%	95-99%