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Author

Deependra Singh Hooda

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INDIA STRATEGIC REVIEW

The ISR features an assessment of key developments, trends, and policies pertaining to India's immediate and continental neighbourhood, and is authored by Lt. Gen. Deependra Singh Hooda (Retd.), Distinguished Fellow for Military Strategy, assisted by Mr. Shreyas Deshmukh, Research Associate. Your comments and feedback may be addressed to Shreyas Deshmukh at shreyas@dpg.org.in. To subscribe, please [click here](#).

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1. Pakistan Prime Minister Shehbaz Sharif held talks with President of Turkey, Recep Tayyip Erdoğan in Istanbul on July 4, 2026. Source: [X/@mfatihkacir](#)
2. India's Minister for Agriculture Shivraj Singh Chouhan, held a bilateral meeting with the Taliban Minister of Agriculture, Mawlawi Ataullah Omari in New Delhi on July 8, 2026. Source: [PIB](#)
3. On May 6, 2026 China's Foreign Minister Wang Yi held talks in Beijing with Bangladeshi Foreign Minister Khalilur Rahman. Source: [Permanent Mission of PRC in the UN](#)

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Contents

PAKISTAN	1
<i>Foreign Policy Developments Amidst US-Iran War</i>	1
<i>Internal Security</i>	2
<i>Unrest and Elections in Pakistan-Occupied Kashmir (PoK)</i>	3
AFGHANISTAN	4
<i>Pakistan-Afghanistan Conflict</i>	4
<i>Regional Outreach</i>	5
DEVELOPMENTS ON THE INDIA-CHINA LINE OF ACTUAL CONTROL (LAC)	6
<i>Foreign Ministers' Meeting</i>	6
<i>Military Developments Across the LAC</i>	6
BANGLADESH	7
<i>Political Developments</i>	7
<i>China-Myanmar-Bangladesh Economic Corridor</i>	8
NEPAL	9
<i>One Hundred Days of the Balendra Shah Government</i>	9
SRI LANKA	10
<i>Economic Situation</i>	10

India Strategic Review

by

Lt. Gen. Deependra Singh Hooda (Retd.)

PAKISTAN

Foreign Policy Developments Amidst US-Iran War

On July 8, US President Donald Trump announced that the interim ceasefire agreement with Iran, mediated by Pakistan, was over. He also revoked a license allowing Iran to sell oil after three tankers were hit by projectiles in the Strait of Hormuz.¹ Since then, there have been continuous US strikes in Iran. Tehran has responded with missile and drone strikes on US assets in Kuwait, Bahrain, Qatar, Jordan and Saudi Arabia.

There has been a regional expansion of the war, with Saudi Arabia, Bahrain, and Kuwait also joining the US in targeting Iran and Iranian proxies in Iraq.² Yemen's Houthis have opened a new front in support of Iran, firing on Saudi oil installations in two ports on the Red Sea coast and declaring a blockade of the Bab al-Mandeb Strait for Saudi ships.³

On July 30, Pakistan Foreign Ministry spokesperson Tahir Andrabi told reporters that it is doing its "utmost" to bring the US and Iran back to the negotiating table under the Islamabad memorandum of understanding.⁴ However, the June framework had left serious issues unresolved. The language on the Strait of Hormuz, sanctions relief, frozen Iranian assets and regional military activity was sufficiently ambiguous to allow both sides to accuse the other of non-compliance. The agreement had created a pause, but not a shared understanding of the end-state.⁵

Meanwhile, Pakistan's military diplomacy in the Gulf is expanding. On July 27, Kuwait ratified a five-year defence cooperation agreement originally signed in June 2023. The agreement covers military training and education, intelligence sharing, defence technology, cooperation in military manufacturing, and joint exercises. A joint military committee will oversee its implementation.⁶

Reuters reported that Pakistan and Kuwait were discussing a substantially expanded defence arrangement in exchange for energy cooperation and investment. Pakistani sources indicate that combat troop deployment was not under consideration at this stage. Other countries that have shown an interest in a defence agreement with Pakistan are Bahrain and Jordan.⁷

On July 13–14, Pakistan Chief of Defence Forces, Field Marshal Asim Munir, undertook an official visit to Türkiye, meeting President Recep Tayyip Erdoğan,

Defence Minister Yaşar Güler and the Turkish military leadership. The visit followed Prime Minister Shebaz Sharif's own talks with Erdoğan in Istanbul on 4 July. Earlier reports in January had indicated that Pakistan, Saudi Arabia and Türkiye were exploring a trilateral defence arrangement, with a draft agreement said to be under consideration in all three capitals.⁸

These initiatives reveal a broader Pakistani strategy of converting its military capacity into diplomatic leverage, energy security, investment and defence exports. It also creates risks. The closer Pakistan becomes tied to the security of Saudi Arabia, Kuwait and other Gulf states, the harder it will be to preserve credibility as an intermediary with Iran. Wider commitments could also stretch a military already confronting sustained conflict with Afghanistan and severe insurgencies in Khyber Pakhtunkhwa and Balochistan.

Internal Security

The first week of July saw one of the deadliest coordinated waves of attacks on security forces in Balochistan. The most serious incident occurred when militants stormed the Mangi Dam police post in Ziarat district on July 6. Nine policemen were initially killed in the attack. The bodies of 18 additional police personnel, who were abducted, were later recovered. Tehrik-i-Taliban (TTP) claimed responsibility for the attack. On July 8, in an ambush on an army convoy near Bela and Winder, 11 soldiers were killed.⁹

In response to the attacks, Pakistan launched Operation Shaban, combining the Army, Frontier Corps, police, air assets and intelligence-based operations. Operation Shaban is unfolding in two distinct areas in Balochistan. In the province's northern districts, the operation is targeting TTP elements and their sanctuaries. In southern Balochistan, the military campaign is focusing on the Balochistan Liberation Army (BLA) and affiliated groups.¹⁰ While the Pakistan Army has claimed considerable success in the operation, militant attacks continue.

Five Punjabi workers were killed in Mashkel town of Balochistan's Washuk district on July 12.¹¹ In a similar attack on July 22, three people were killed, and five others injured, when militants opened fire on a Karachi-bound passenger bus in the Khud Kocha area of Mastung district on July 22. A day later, a district and sessions judge and his bodyguard were killed when militants ambushed his convoy in Mastung.¹²

Violence also continues in Khyber Pakhtunkhwa. On July 24, a suicide bomber and gunmen attacked a security checkpoint in Tank, killing 15 security personnel.¹³ On July 30, militants attacked the Khazina police post in Hangu district, Khyber Pakhtunkhwa. Eleven police officers and 15 attackers were killed, while more than two dozen policemen were wounded.¹⁴ The TTP carried out both attacks.

The government's response remains overwhelmingly military. Islamabad continues to describe Baloch groups and the TTP as foreign-backed proxies, but it has not presented a credible political strategy for addressing Baloch grievances or the governance deficit in the former tribal districts. Operation Shaban may impose substantial losses on insurgent groups, but repeated cycles of large operations have not improved the internal security situation.

Unrest and Elections in Pakistan-Occupied Kashmir (PoK)

The protest movement led by the Jammu Kashmir Joint Awami Action Committee (JAAC), which had erupted in June, intensified during July and became entangled with elections to the legislative assembly. At the centre of the dispute are 12 seats reserved for refugees from Jammu and Kashmir who live elsewhere in Pakistan. JAAC, proscribed under anti-terror laws in June, argues that these seats allow Pakistan-based political parties to determine the composition of the regional government and dilute the political representation of those actually living in PoK.

The arrest of prominent JAAC leader Shaukat Nawaz Mir on June 30 became the immediate trigger for renewed mobilisation in early July. The JAAC called region-wide demonstrations and shutter-down strikes demanding his release. The confrontation turned violent on July 14 when clashes in Rawalakot and Tararkhal killed seven protesters and two members of the security forces.¹⁵

The regional assembly election was divided into three phases because of the deteriorating security situation. The first phase, held on July 27, was marked by deadly clashes, with the JAAC claiming that more than 30 people had been killed.¹⁶ An internet and mobile services shutdown has made it difficult to assess the situation in PoK accurately. Amnesty International has called for an independent investigation into the violence, restoration of communications and the lifting of the ban on the JAAC.¹⁷

The government has adopted a confrontational position towards the agitation. Pakistan Defence Minister Khawaja Asif has described disobedience to the state as the “beginning of sedition” and questioned whether residents of Rawalakot could be regarded as Kashmiris. He has also remarked that the protesters are in the same category as India and should be considered as enemies like India.¹⁸

The Indian Ministry of External Affairs described the elections as a “cosmetic electoral exercise” intended to camouflage Pakistan's illegal occupation and hide its grave human rights violations in the region. It stated that the ongoing mass protests in PoK are the direct consequences of economic exploitation, denial of fundamental rights to the people, and their administrative oppression.¹⁹

The unrest has moved beyond an episodic dispute over electricity tariffs and subsidies. It now concerns political representation, local control over resources and the legitimacy of the institutional structure imposed by Islamabad. By adopting a coercive approach, Pakistan risks deepening political alienation and discrediting its claim to be a champion of Kashmiri rights.

AFGHANISTAN

Pakistan-Afghanistan Conflict

Border tensions between Pakistan and Afghanistan persist. On July 1, Afghan forces fired four rudimentary drones into Balochistan, injuring two people. Afghanistan's defence ministry claimed it had struck what it called Islamic State "centres", while Pakistan described it as part of the Afghan Taliban's "patronisation and support of terrorist outfits."²⁰ There were also reports of border clashes between the two sides on July 6 and 9.²¹

On July 28, the UN Assistance Mission in Afghanistan (UNAMA) released its quarterly human rights update. The report documented 499 civilians killed and 1,216 wounded in Afghanistan by the cross-border fighting between October 2025 and the end of June 2026. The report singled out two successive Pakistani airstrikes on a residential building in Paktia's Chamkani district on 28 June, which killed 22 civilians and wounded more than 185, many of them struck by the second strike while trying to rescue victims of the first.²²

On July 31, Pakistan's military rejected the UNAMA report as "baseless." Military spokesman Lt. Gen. Ahmad Sharif Chaudhry stated the strikes had targeted only TTP hideouts and infrastructure and that those killed were militants. He said Pakistan had recorded 3,145 "terrorism incidents" since January, in which 819 Pakistanis had died, and 2,084 militants had been killed. Chaudhry said Pakistan launched a new counterterrorism operation earlier this year following a surge in militant violence and would continue the campaign.²³

The ongoing conflict has adversely impacted trade between the two countries. Afghanistan's transit trade through Pakistan has declined by 93% during the 2025-26 fiscal year. The volume of Afghan cargo transported through Pakistan fell to 11,592 containers in 2026, compared with nearly 89,000 containers four years earlier. The value of exports transported via Pakistan has collapsed from \$454 million in 2025 to about \$7 million in fiscal year 2026.²⁴ This has accelerated a reorientation of Afghanistan's external relations.

Regional Outreach

Afghanistan's desire to reduce its dependence on Pakistan is visible in its expanding engagement with Iran, the Central Asian republics, Russia, China and India. According to a May 2026 World Bank report, India is Afghanistan's largest export destination, accounting for 33.7 per cent of exports, followed by Iran, China and Uzbekistan. Afghanistan has increasingly redirected its trade, with 56 per cent of imports entering directly from, or transited through, Iran, while Central Asian corridors account for a further 41 per cent.²⁵

On July 16, Iran, Tajikistan and Afghanistan signed an agreement to establish a road transit corridor aimed at expanding regional trade and improving cross-border transportation links. The new corridor would facilitate the movement of commercial goods between Iran and Tajikistan through Afghan territory, potentially increasing Afghanistan's role as a transit hub linking Central Asia with neighbouring markets.²⁶

Meanwhile, the first direct rail freight shipment from China to Afghanistan arrived in Herat in western Afghanistan on July 21. The inaugural shipment, consisting of 500 tonnes of MDF boards, was loaded in Beijing and transported through Turkmenistan and Iran before reaching Rozanak Station in Herat without requiring unloading or reloading during transit.²⁷

Mawlawi Ataullah Omari, Minister of Agriculture, Irrigation and Livestock of Afghanistan, accompanied by a high-level delegation, paid an official visit to India on July 7 – 12. During the meeting with India's Minister for Agriculture Shivraj Singh Chouhan, the two sides reviewed ongoing cooperation. They explored new avenues for collaboration in agriculture, irrigation, livestock, agricultural research, capacity building and agri-trade. The Afghan Minister also met Chirag Paswan, Minister of Food Processing Industries, and Pabitra Margherita, Minister of State for External Affairs.²⁸

Complementary interests drive the growing relationship between India and Afghanistan. Afghanistan requires markets for its agricultural exports, access to medicines, technical expertise and routes that bypass Pakistan. India seeks to preserve its influence in Afghanistan and prevent the country from becoming strategically dependent on Pakistan or China.

DEVELOPMENTS ON THE INDIA-CHINA LINE OF ACTUAL CONTROL (LAC)

Foreign Ministers' Meeting

On July 22, External Affairs Minister Dr S Jaishankar met Chinese Foreign Minister Wang Yi in Manila on the sidelines of the ASEAN and East Asia foreign ministers' meetings. Dr Jaishankar reiterated that peace and tranquillity in the border areas is a “pre-requisite” for normal relations and that ties must be anchored in mutual respect, mutual interest and mutual sensitivity. While he welcomed the steps taken towards normalisation, he also flagged Indian concerns over market access, the trade imbalance and supply-chain uncertainties.²⁹

The meeting was followed by an unusual public dispute over the two official accounts. China's official readout of the Manila meeting claimed that Dr Jaishankar had told Wang Yi that India's positions on Taiwan and Xizang (Tibet) remained unchanged and that India respects China's sovereignty.³⁰ These remarks did not appear in the Indian account of the meeting.

On July 24, the Ministry of External Affairs rejected the Chinese formulation. Spokesperson Randhir Jaiswal stated that when sovereignty issues are discussed, it is India that should be raising them. China has been in illegal occupation of Indian territory in Jammu and Kashmir and Ladakh since 1963, and Chinese projects are being undertaken in territories that belong to India.³¹

Despite the readout dispute, the gradual thaw is holding, with the reopening of border trade through Lipulekh in Uttarakhand and Nathu La in Sikkim from August 1, after a suspension of several years. Indian Foreign Secretary Vikram Misri visited Beijing on July 27-28, where he held extensive discussions with Chinese officials, including Vice Foreign Minister Hua Chunying. However, the diplomatic improvement in relations has not been accompanied by any significant reduction in military capabilities across the LAC.

Military Developments Across the LAC

Commercial satellite imagery from late June and early July showed the deployment of at least 11 J-20 stealth fighters at two airbases oriented towards India. On July 9, seven J-20 aircraft were visible at Hotan, a dual-use airbase in Xinjiang located approximately 245 km from the Indian airfield at Daulat Beg Oldie. Four more J-20s were observed at Damxung in the Lhasa prefecture, approximately 344 km northwest of Tawang.³²

The J-20 provides China with a low-observable platform for air-superiority, surveillance and long-range engagement missions. Its forward deployment is significant because India does not possess an operational stealth fighter. The Indian Air Force's Rafale and Su-30MKI aircraft remain capable, but they are non-stealth platforms.

China is simultaneously expanding its capacity to employ unmanned systems in high-altitude conditions. On July 3, the Plateau Drone Research and Development Application Centre was inaugurated at Xizang University in Lhasa. It was described as the country's first institution dedicated exclusively to the development and deployment of unmanned aerial systems in high-altitude plateau conditions, with border patrol, security, logistics and emergency-response applications. The centre is not formally identified as a PLA institution, but the overlap between civilian and military requirements is evident. The inclusion of border patrol and security among the centre's proposed functions points to its dual-use character.³³

Since the October 2024 disengagement agreement, there has been no progress on further de-escalation or the withdrawal of troops from forward areas. The continuing expansion of military capabilities along the LAC therefore constrains the scope of diplomatic normalisation.

BANGLADESH

Political Developments

Bangladesh President Mohammed Shahabuddin resigned on July 24, two years ahead of the end of his term. Shahabuddin was one of the last senior constitutional office holders associated with the former Awami League government and had faced sustained pressure from leaders of the ruling Bangladesh Nationalist Party (BNP) to step down.³⁴ After his resignation, complaints were filed against him with the Bangladesh International Crime Tribunal (ICT), seeking his probe into crimes against humanity allegedly committed during the 2024 uprising against the Sheikh Hasina Government. Law Minister Mohammad Asaduzzaman has said that Shahabuddin will be probed for corruption allegations.³⁵

According to the Constitution, Speaker Hafiz immediately assumed the responsibilities of acting president. The Election Commission must now conduct the presidential election within 90 days, in which members of Parliament will elect the next head of state.

Sheikh Hasina has said that she is planning to return to Bangladesh in December. The former prime minister told the Reuters news agency in an interview published on July 10 that her return is a coordinated effort to challenge the legal actions taken against her party, the Awami League, which has been banned. Hasina has urged other exiled party members, including former Home Minister Asaduzzaman Khan Kamal who also faces a death sentence, to join her.³⁶ Sheikh Hasina faces a death sentence after the ICT found her guilty of crimes against humanity during the 2024 uprising.

Bangladesh Law Minister Asaduzzaman said there would be no scope for Sheikh Hasina to surrender to a court, as she would be arrested immediately upon return and the court verdict against her would be executed in accordance with the law.³⁷ India has reiterated its earlier stance that Dhaka's request for the extradition of Sheikh Hasina is under examination, given the legalities and the judicial processes involved.³⁸

If Hasina does return to Bangladesh, it could reopen the 2024 fault lines and force a confrontation with the BNP government. If her death sentence is carried out, it could create fresh tensions between New Delhi and Dhaka.

China-Myanmar-Bangladesh Economic Corridor

On July 22, Chinese Foreign Minister Wang Yi met Bangladesh Foreign Minister Khalilur Rahman in Manila. The Chinese official account stated that Bangladesh was ready to advance cooperation on the China-Myanmar-Bangladesh Economic Corridor (CMBC).³⁹ This issue was also discussed during Prime Minister Tarique Rahman's visit to Beijing in June.

The CMBC is effectively a revival of the earlier Bangladesh-China-India-Myanmar (BCIM) corridor, without India. The original BCIM corridor never moved far beyond discussions as India was reluctant to place the project under China's Belt and Road Initiative. The Chinese Ambassador to Bangladesh, Yao Wen, has stated that it remained open to any country, including India, willing to join the CMBC.⁴⁰

The proposed corridor would link Kunming in China's Yunnan province through Mandalay and western Myanmar to Bangladesh's ports and transport networks at Chattogram, Cox's Bazar and Mongla. For Bangladesh, the project promises Chinese investment in roads, railways, ports and economic zones and improved access to Chinese and Southeast Asian markets. For China, it would extend the China-Myanmar Economic Corridor towards the Bay of Bengal and provide another route to the Indian Ocean.⁴¹

The corridor has a strategic significance for India because it would expand China's infrastructure and logistics presence on India's eastern flank, close to the Bay of Bengal. However, implementation is unlikely in the near term. Much of the proposed

route through Myanmar passes through areas affected by civil war, particularly Rakhine State, where the military government does not exercise effective control. Dhaka has also stated that any connectivity be accompanied by progress on the safe, voluntary and dignified return of the roughly 1.2 million Rohingya refugees it hosts.⁴² The proposal should therefore be viewed as a geopolitical signal and a long-term connectivity ambition rather than an immediately executable project.

NEPAL

One Hundred Days of the Balendra Shah Government

Prime Minister Balendra Shah's government completed its first 100 days on July 4 with a mixed record. The government has claimed that 87.2 per cent of its 100-point governance reform agenda has been achieved, with 70 of the 100 points fully implemented.⁴³ However, an independent assessment of the government's programme found that it has delivered on only about a third of its initial commitments. Progress was strongest in digital governance, anti-corruption measures and administrative simplification, while nearly two-thirds of the agenda remained unimplemented or existed only as policy announcements.⁴⁴

The government's most visible initiative has been its campaign against corruption and political impunity. Within a day of taking office, it ordered action against former Prime Minister KP Sharma Oli and former Home Minister Ramesh Lekhak over their alleged responsibility for the use of excessive force during the September 2025 protests. Investigations were also initiated against former ministers, senior officials and prominent business figures, while a high-level commission was established to examine the assets of public officials. These actions have strengthened Shah's image as a leader willing to challenge powerful political and commercial networks.

Shah's relationship with Parliament has been a significant weakness. Despite commanding a near two-thirds majority, his government has frequently relied on ordinances for major administrative changes rather than introducing legislation for parliamentary debate. Since assuming office, Shah has been sharply criticised for what opposition parties describe as an unprecedented pattern of avoiding direct parliamentary accountability.⁴⁵

The government has taken some steps to improve the business environment, including faster company registration and simplified investment approvals, but these have not yet translated into a clear improvement in investor confidence. The government has announced ambitious targets for hydropower, infrastructure and

employment, but the mobilisation of investment required to implement these plans remains uncertain.

Foreign policy also lacked a clearly established direction. Shah undertook no foreign visit during his first 100 days and maintained limited direct engagement with visiting foreign representatives. Substantive external engagement was conducted largely by Foreign Minister Shishir Khanal and RSP chairman Rabi Lamichhane. Shah's remarks in Parliament that Nepal had also encroached on Indian territory caused an uproar and required the Foreign Ministry to clarify that he had referred to localised disputes involving boundary pillars and no-man's land rather than Nepal's formal position on Kalapani, Limpiyadhura and Lipulekh.

The early popularity of the government was built on the rejection of Nepal's established political class. The first 100 days show that governance demands more than popularity.

SRI LANKA

Economic Situation

Sri Lanka entered the final phase of its four-year International Monetary Fund (IMF)-supported programme in July. The combined fifth and sixth reviews have released approximately \$695 million, bringing total disbursements to about \$2.4 billion. The IMF assessed programme performance as generally strong but projected growth to slow to 3 per cent in 2026 because of higher oil prices, reduced tourism flows and the continuing impact of the Middle East conflict. Public debt remains close to 100 per cent of GDP, and headline inflation has risen sharply from 1.6 per cent in February to 5.5 per cent by May, prompting the Central Bank of Sri Lanka to raise its policy rate by 100 basis points and deploy macroprudential measures.⁴⁶

The external shock of the Middle East conflict has been severe for an economy that runs almost entirely on imported energy. The fuel import bill surged to roughly \$886 million in April, from about \$152 million the previous December, while tourism revenue fell by nearly 39 per cent year-on-year in April as travellers stayed away amid regional uncertainty and the aftermath of Cyclone Ditwah. To give some relief to the government, the IMF has allowed the central government deficit to widen to 5.1% of GDP (up from 2.3% in 2025).⁴⁷

The reform agenda for the final programme year is politically demanding. The IMF has noted that the government must maintain cost-recovery energy pricing, improve tax compliance, improve public financial management, and strengthen the social

safety net. These measures are necessary for macroeconomic stability but continue to generate public resentment because households experience higher prices and taxes.

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Delhi Policy Group

Core 5A, 1st Floor,
India Habitat Centre, Lodhi Road
New Delhi - 110003
India

www.delhipolicygroup.org