



Delhi Policy Group

Advancing India's Rise as a Leading Power

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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. The research team includes Shreyas Deshmukh, Research Associate. Your comments and feedback may be addressed to Shreyas Deshmukh at shreyas@dpg.org.in. To subscribe, please [click here](#).

Cover Images:

Pakistan Army Chief Field Marshal Munir and Prime Minister Shehbaz Sharif showing Pakistan's Strategic Minerals to the US President Donald Trump on September 25, 2025, in Washington. Source: [White House](#)

Nepal President Ramchandra Paudel administered the oath of office to newly appointed Prime Minister Sushila Karki on September 12, 2025. Source: [X/ @kathmandupost](#)

Press conference of Bangladesh Jamaat-e-Islami held on September 30, 2025 in which they announced new programs to meet its 5-Point demands. Source: [X/ @BJI_Official](#)

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Contents

PAKISTAN	1
<i>Pakistan-Saudi Defence Pact</i>	1
<i>Pakistan-China Relations</i>	1
<i>US-Pakistan Ties</i>	2
<i>Protests in Pakistan-Occupied Kashmir (POK)</i>	3
AFGHANISTAN	4
<i>Deepening Humanitarian Crisis</i>	4
<i>Bagram Air Base Controversy</i>	4
BANGLADESH	7
<i>Student Union Poll</i>	7
SRI LANKA	8
<i>Chief of Naval Staff of India Visits Sri Lanka</i>	8
NEPAL	8
<i>Gen Z Protest and Collapse of Government</i>	8

India Strategic Review

by

Lt. Gen. Deependra Singh Hooda (Retd.)

PAKISTAN

Pakistan-Saudi Defence Pact

On September 17, during a state visit to Saudi Arabia, Pakistan's Prime Minister Shabaz Sharif and the Crown Prince and Prime Minister of Saudi Arabia, Mohammad Bin Salman, signed a "Strategic Mutual Defence Agreement".¹ While the agreement's specific terms remain confidential, a key clause of the pact declares that "aggression against one nation will be regarded as aggression against both."² The agreement formalises and deepens a long-standing military relationship between Saudi Arabia and Pakistan.

On the issue of Pakistan's nuclear capability being available to Riyadh, both sides have issued ambiguous statements. A Saudi official was quoted as saying, "This is a comprehensive defensive agreement that encompasses all military means." A similar sentiment was echoed by Pakistan's Defence Minister Khawaja Mohammad Asif, who said, "What we have, and the capabilities we possess, will be made available according to this agreement." He later clarified that the nuclear umbrella was "not on the radar."³ However, the very ambiguity about potential nuclear cooperation could be deliberate, sending a strong deterrent signal without outright violating non-proliferation norms.

From Pakistan's perspective, the agreement offers both strategic and economic benefits. Islamabad has long been aligned with Saudi Arabia, but in recent years, it has found itself increasingly isolated as US military aid to Pakistan was severed, India made inroads with Gulf Arab states, and Pakistan became overly dependent on China for diplomatic and financial support. The mutual defence agreement offers Pakistan a much-needed diversification of its alliances.⁴ It also secures vital Saudi investment and funding at a time of fiscal strain.

A mix of regional threat perceptions and doubts about traditional allies drives Saudi Arabia's decision to forge this pact. Foremost is Riyadh's concern over an increasingly volatile neighbourhood and waning confidence in US protection. In the wake of Israel's widening war against Hamas and its allies (which saw Israel strike multiple Arab countries, including Qatar, since late 2023), Gulf states have grown uneasy that Washington is either unwilling or unable to restrain Israel.⁵

Surprisingly, Iran's initial reaction to the Saudi-Pakistan pact was cautiously positive. In his address at the UN General Assembly on September 24, Iranian President Masoud Pezeshkian welcomed the defence agreement as a beginning for a comprehensive regional security framework.⁶ Tehran sees an advantage in any move that lessens US dominance in the region and serves as a counterweight to Israel.

The Indian Ministry of External Affairs stated that it will study the implications of the defence agreement for India's national security, as well as regional and worldwide stability.⁷ While there is considerable commentary on how this could impact a future India-Pakistan crisis, it is unlikely that Riyadh will risk jeopardising ties with India. Saudi officials have emphasised that the relationship with India remains strong and will continue to grow.⁸

Pakistan-China Relations

Pakistan Prime Minister Shehbaz Sharif visited China for the Shanghai Cooperation Organisation (SCO) summit in Tianjin held from August 31 to September 1. Pakistan Army Chief, Field Marshal Asim Munir, was a part of the delegation.

In his meeting with Chinese President Xi Jinping, Sharif supported the Global Governance Initiative and promised to give it full support and work actively to implement it. Xi stated that China stands ready to work with Pakistan to develop upgraded versions of the China-Pakistan Economic Corridor (CPEC) and the China-Pakistan Free Trade Agreement, and hopes that Pakistan will take effective measures to ensure the safety of Chinese personnel, projects, and institutions in Pakistan.⁹

During the visit, the two sides signed multiple cooperation documents covering the CPEC, economy and trade, artificial intelligence, science and technology, agriculture, cultural heritage protection, judiciary, and people's livelihood. The two countries signed \$8.5 billion in investment agreements, which included \$7 billion in memorandum of understanding and \$1.5 billion in joint ventures.¹⁰

Pakistan's President Asif Ali Zardari visited China from September 12 to 21, during which he travelled to Chengdu, Shanghai, and Xinjiang, and met with provincial leadership. During his visit to the Kashgar Free Trade Zone, Zardari emphasised the need for enhanced air connectivity to Pakistan and increased trade through the Khunjerab route.¹¹

President Zardari also visited the Aviation Industry Corporation of China (AVIC) in Chengdu, where he was briefed on China's latest aerospace capabilities, including the J-10 fighter jet, JF-17 Thunder co-production, J-20 stealth aircraft, UAV technologies, and multi-domain command-and-control systems. Zardari praised the AVIC as "a

symbol of China's technological advancement and of the enduring strategic partnership between Pakistan and China."¹²

Even as China and Pakistan are talking about upgrading the CPEC, it is clear that Beijing remains concerned about the security of Chinese personnel and projects. This issue was raised by the Chinese leadership in all meetings with Shehbaz Sharif.

US-Pakistan Ties

Prime Minister Shehbaz Sharif, accompanied by Field Marshal Munir, met US President Donald Trump on September 25 in Washington. The meeting was closed-door and lasted for an hour. According to a statement from Sharif's office, the Prime Minister praised Trump as a "man of peace" whose leadership helped avert a catastrophe by facilitating the May ceasefire with India. He thanked Trump for the U.S.-Pakistan tariff arrangement concluded earlier this year and invited American companies to invest in Pakistan's agriculture, information technology, mining and energy sectors.¹³

Following the bilateral talks, Prime Minister Sharif, in his speech at the United Nations General Assembly, hailed President Trump for playing an "active role" in brokering the ceasefire between India and Pakistan in May. Further, he pushed for a Nobel Peace Prize for Trump, claiming that he is a "man of peace."¹⁴

While there is a definite upswing in US-Pakistan ties, many observers stress that the rapprochement remains highly transactional as both sides are engaging less on the basis of shared long-term strategy and more on immediate, quid-pro-quo exchanges. US interests are based on the support Pakistan can provide in counterterrorism, Afghanistan, and to the US diplomacy in West Asia. Interest has also been shown in Pakistan as a source of critical minerals.¹⁵

For Pakistan, the US is seen as a source of investment, tariff relief, and access to technology at a time when Pakistan is cash-strapped and overly dependent on Beijing. Pakistan's leaders are also quick to broadcast any US concessions (tariff relief, investment pledges) to show tangible gains for domestic approval.

Protests in Pakistan-Occupied Kashmir (POK)

On September 28, mass protests broke out across POK over the government's failure to address the demands put forth by the Joint Awami Action Committee (JAAC). On September 29, violence erupted in Muzaffarabad when a "peace rally" led by Muslim Conference leader Raja Saqib Majeed clashed with JAAC protesters who had gathered there. According to eyewitness accounts, participants from the peace rally, which was

protected by police and paramilitary forces, opened fire on the JAAC demonstrators "without any provocation." At least two people were killed and 22 were injured in the confrontation.¹⁶

In anticipation of the protests, Pakistani authorities deployed thousands of additional security personnel from Punjab province and sent an additional 1,000 police officers from Islamabad. The government also imposed a complete communication blackout from September 28, suspending internet, mobile phone, and landline services across the region to prevent protest mobilisation.¹⁷

The protests were driven by the JAAC's comprehensive 38-point charter of demands that addresses decades of perceived neglect and exploitation by Pakistan's federal government. Key demands in the charter include subsidies on food and electricity, the abolition of 12 legislative assembly seats reserved for Kashmiri refugees living in Pakistan, the rollback of elite privileges for politicians, bureaucrats, and judges, infrastructure development, and the provision of free education and healthcare facilities for all residents.¹⁸

The current movement reflects deep grievances about Pakistan's administration of the territory, with protesters accusing successive governments of systematic exploitation, corruption, and denial of basic rights for over 70 years.

AFGHANISTAN

Deepening Humanitarian Crisis

The International Organization for Migration (IOM) cautioned that Afghanistan is experiencing a triple crisis of substantial migrant returns, diminishing aid, and catastrophic natural disasters, thus rendering millions susceptible to poverty. Almost 2.6 million Afghans have been repatriated from Iran and Pakistan in 2025, with a significant number experiencing forced deportations.¹⁹

Women are among the most vulnerable, given that numerous individuals who studied or worked in Iran now experience Taliban-imposed limitations on education and employment within Afghanistan. Women make up just under one-third of returnees from Iran so far in 2025, and about half of all returnees from Pakistan.

Pakistan has decided to shut down 16 Afghan refugee camps in Khyber Pakhtunkhwa (KP), Balochistan, and Punjab as the repatriation of refugees continues. The Pakistan federal government, in August, informed the provinces that the formal repatriation and deportation of over 1.3 million Afghan refugees holding Proof of Registration (PoR) cards would begin on September 1. As a result, in September, PoR cardholders

accounted for 55 per cent (116,000 individuals) of all returns from Pakistan, a dramatic increase from just 6 per cent in April.²⁰

Western governments' broad cuts to humanitarian and development aid, most notably US President Donald Trump's decision to freeze the foreign assistance in February, have worsened the humanitarian crisis in Afghanistan. An estimated \$1.7 billion in US aid to Afghanistan has been stripped away this year, forcing international aid organisations to partly or wholly suspend operations.²¹

More than 2200 people were killed in a 6.0-magnitude earthquake which struck on August 31, destroying entire villages across the country's eastern Kunar and Nangarhar provinces, which border Pakistan. Some estimates indicate that almost half a million people could be affected by the earthquake.²² India responded swiftly, with the first set of relief items delivered on September 1, followed by an airlift of 21 tonnes of relief materials the next day.²³

The Taliban's ideological constraints are posing challenges to aid operations by international organisations in Afghanistan. The World Health Organisation (WHO) has asked Taliban authorities to lift restrictions on Afghan female aid workers and allow them to travel without male guardians, as the women struggled to access healthcare after the earthquake.²⁴

Rather than easing restrictions, the Taliban intensified enforcement of existing policies. On September 8 - just one day after the WHO's public appeal - Taliban security forces began preventing Afghan female UN staff from entering UN compounds in Kabul. This restriction was then extended to UN field offices across the country, with armed guards stationed at UN premises in Kabul, Herat, and Mazar-i-Sharif to enforce the ban.²⁵

New edicts issued by the Taliban serve to reinforce its rigid autocratic control. The Taliban regime has excluded literature authored by women from the Afghan university teaching system and has also banned the teaching of human rights and sexual harassment.²⁶

On September 15, the Taliban issued decrees banning fibre-optic internet services in several provinces, citing moral grounds to curb "immorality.". By September 29, authorities extended the ban nationwide, physically severing fibre cables "until further notice". Internet monitoring groups reported that connectivity across Afghanistan had fallen to 1% of normal levels, effectively resulting in a total blackout. Telephone and mobile data networks, which rely on the same fibre infrastructure, also went down.²⁷ The internet blackout is crippling banking and financial systems, limiting access to medical care and remittances, and disrupting aviation.

Bagram Air Base Controversy

On September 18, while interacting with the press, President Trump said that the United States had sought to regain control of Bagram Airbase in Afghanistan. Located 40 km north of Kabul, Bagram was the largest military installation used by American forces during the war in Afghanistan. Later, on September 20, he threatened the Taliban on his Truth social platform, saying, "If Afghanistan doesn't give Bagram Airbase back to those that built it, the United States of America, BAD THINGS ARE GOING TO HAPPEN."²⁸ Trump has cited the base's proximity to China's nuclear facilities as a major reason for regaining US control of the base.

Afghan Taliban officials pushed back, saying a deal was "not possible," and called on the United States to abide by the 2020 Doha accord. Taliban spokesperson, Hamdullah Fitrat, said: "The United States pledged that 'it will not use or threaten force against the territorial integrity or political independence of Afghanistan, nor interfere in its internal affairs.'²⁹

However, the Taliban have left the possibility of talks open. Zakir Jalaly, a foreign ministry official, posted on social media: "Without the US having any military presence in Afghanistan, both Afghanistan and the US need to engage with each other, and they can have political and economic relations based on mutual respect and shared interests."³⁰

China has said the decision to reestablish the US presence at Bagram Airbase should be left to Afghanistan and its people and that "hyping up regional tensions does not win support."³¹ Russia's envoy for Afghanistan, Zamir Kabulov, warned the US that Trump's demand to retake Bagram would spark fierce Afghan resistance and have "catastrophic consequences."³² A Joint Statement of the Fourth Quadripartite Meeting of Foreign Ministers of China, Iran, Pakistan, and Russia, held in New York, on the sidelines of the United Nations General Assembly on September 25, opposed the "reestablishment of military bases in Afghanistan and the region by the countries responsible for the current situation."³³

While the return of Bagram appears unlikely, the Taliban is engaging with the US on prisoner exchanges, economic arrangements, and a small security presence in Bagram.³⁴ On September 28, Amir Amiry, a US citizen held by the Taliban in Afghanistan for nine months, was released after a breakthrough in negotiations. Amiry is the fifth American to be freed from detention in Afghanistan this year. In exchange, the US released Khan Mohammad, a Taliban figure who was imprisoned for life in California on drug trafficking and terrorism charges.³⁵

BANGLADESH

Student Union Poll

A year after it was banned, Islami Chhatra Shibir, the student wing of Bangladesh Jamaat-e-Islami, won a major university poll in Bangladesh. On September 10, Shibir swept the Dhaka University Central Students Union (DUCSU) election, winning 23 of the 28 posts. Jatiyatabadi Chhatra Dal, the student wing of the Bangladesh Nationalist Party (BNP), did not secure any of the 28 seats. Three days later, the performance was repeated in Jahangirnagar University, where Islami Chhatra Shibir won 20 of the 25 posts.³⁶ These wins were a dramatic reconfiguration of campus politics, with Islamist forces challenging decades-long dominance of secular student groups.

The student union polls in Bangladesh have garnered attention as they take place just five months ahead of the February 2026 election in Bangladesh. The elections at Dhaka University and Jahangirnagar University are expected to be followed by polls in universities in Rajshahi, Chittagong, and other institutions, where Shibir's victory is anticipated to create a positive sentiment in favour of Shibir candidates.³⁷

The victory reflects broader public frustration with both major parties—the now-banned Awami League and the BNP. Many observers attribute the results to anger and fatigue against mainstream parties associated with corruption and misgovernance. The BNP has stated that the university elections would not impact the national elections in February 2026, but the Jamaat is gaining influence. A recent national youth survey by the South Asian Network on Economic Modeling (SANEM) estimates that nearly 22% of voters under 35 now support Jamaat-e-Islami, while 39% back the BNP.³⁸

Encouraged by the student polls, four religious political parties, including Bangladesh Jamaat-e-Islami, are set to take to the streets with several common demands, including holding the national election in February based on the July Charter.³⁹ Islami Andolan Bangladesh (Charmonai Pir) Ameer Mufti Syed Muhammad Rezaul Karim has announced that the country's Islamic political parties are close to forming an alliance.⁴⁰

Increasing Islamist influence would be of concern to India, particularly given Jamaat-e-Islami's historically pro-Pakistan stance and its role during the 1971 liberation war, when it collaborated with Pakistani forces. The Islamist political resurgence could further strain India-Bangladesh ties, which have already deteriorated under the interim government.

SRI LANKA

Chief of Naval Staff of India Visits Sri Lanka

Admiral Dinesh K. Tripathi, Chief of the Naval Staff of India, undertook an official four-day visit to Sri Lanka from September 22 to 25, 2025. During his visit, he held extensive discussions with Sri Lankan Prime Minister Dr Harini Amarasuriya, senior defence officials, and tri-service chiefs, focusing on enhancing bilateral defence cooperation, particularly in maritime security, joint training, and operational synergy.⁴¹

Admiral Tripathi delivered a keynote address at the 12th Galle Dialogue International Maritime Conference in Colombo, themed "Maritime Outlook of the Indian Ocean under Changing Dynamics". In his address, Admiral Tripathi highlighted three core imperatives for regional maritime security: credible capability, deeper cooperation, and technological transformation. He emphasised the need for interoperable systems and inclusive Maritime Domain Awareness to improve early warning and coordinated response.⁴²

The visit builds upon a long history of high-level defence and naval engagements between India and Sri Lanka, which have steadily deepened bilateral military cooperation and interoperability. These engagements have strengthened maritime security cooperation and addressed common challenges such as piracy, narcotics trafficking, and illegal fishing in the Indian Ocean Region.

NEPAL

Gen Z Protest and Collapse of Government

Facing growing online dissent from Nepali youth, the Oli government, on September 4, banned 26 social media and messaging platforms, including Facebook, WhatsApp, Instagram, X, and YouTube, on the pretext that they were not registered in the country.⁴³ The ban backfired as thousands of young people gathered in Kathmandu on September 8 in a "Gen Z demonstration against corruption." As the protestors breached the barricades at the Parliament complex, the police opened fire, killing at least 19 people and injuring over 100.

The government hastily lifted the social media ban, but it had no effect. On September 9, even larger crowds took to the streets demanding the resignation of Prime Minister Oli. Demonstrators torched the Singha Durbar (the main government complex), set

ablaze the Parliament building and Supreme Court, and attacked political residences, including Oli's private home.⁴⁴ The two-day violence left 72 people, including three policemen, dead and thousands injured.

Facing an acute crisis, Prime Minister Oli tendered his resignation on the evening of September 9, stating it was to "facilitate a solution to the problem and to help resolve it politically." The Nepalese Army assumed control of security and appealed to the youth to play a constructive role in maintaining social harmony.⁴⁵

On September 12, Sushila Karki, a former Chief Justice of Nepal, was sworn in as Nepal's interim Prime Minister. Gen Z protesters had earlier backed Karki in an online vote on the chatting app Discord, where she emerged as the most favoured candidate.⁴⁶ It was the first time in history that a prime minister had been chosen via an online vote. She is also the first woman to assume the office of Prime Minister of Nepal. Later, Rameshore Khanal was sworn in as the finance minister, Kulman Ghising as the minister for energy, water resources, and irrigation, and Om Prakash Aryal as the minister for home affairs.⁴⁷ Elections are scheduled to be held on 5 March 2026.

Despite calls for drastic reforms and an overhaul in major political parties following the Gen Z movement, the country's three major political parties – the Nepali Congress, CPN-UML, and CPN (Maoist Centre) – appear to be very reluctant to make fundamental changes. There is no indication that the current crop of leaders will make way for a younger generation.⁴⁸

India has welcomed the formation of the new Interim Government in Nepal. On September 18, Prime Minister Narendra Modi held a telephone conversation with Prime Minister Sushila Karki during which he conveyed "India's full support to Nepal in its efforts towards restoring peace and stability."⁴⁹ Oli's tenure had been marked by periods of India-Nepal friction over border issues and India's suspicions of Oli's closeness to China. Now, with a caretaker regime in place, India has an opportunity to rebuild goodwill.

China's reaction has been muted and cautious, with neither the Chinese President nor the Prime Minister issuing a public congratulatory message. It was left to the Chinese Ambassador to Nepal to formally extend congratulations to Prime Minister Karki and reaffirm bilateral cooperation.⁵⁰ China could be concerned about the sidelining of the communist parties that had been cultivated over the years to secure Beijing's strategic interests.

Nepal's democratic stability now hinges on whether faith can be reestablished in elected leaders. This will require deep systemic changes to prevent a return to the era of corrupt politics and frequent government changes.

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