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How Pakistan Is Rebuilding for the Next India Conflict?

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EXECUTIVE BRIEF & KEY FINDINGS

More than a year after Operation Sindoor, Pakistan's military modernisation is beginning to reveal the lessons Rawalpindi appears to have drawn from the May 2025 confrontation with India. The response is broader than purchasing additional combat aircraft. Pakistan is building a dedicated conventional rocket force, expanding layered air and counter-drone defences, strengthening beyond-visual-range air combat, pursuing fifth-generation aviation and airborne early warning systems, investing heavily in unmanned warfare, and accelerating expenditure on military hardware.The pattern suggests that Pakistan's priority is not necessarily to achieve platform-for-platform parity with India. Rather, it is to raise the military cost of another limited Indian punitive campaign. The establishment of the Army Rocket Force Command is particularly significant because it creates an institutional structure for precision conventional fires below the nuclear threshold. At the same time, Chinese systems remain central to Pakistan's airpower architecture, while Türkiye is becoming increasingly relevant in drones, air defence and aerospace cooperation.A new agreement between the Pakistan Army and US drone manufacturer Powerus in September 2026 adds another dimension. Pakistan may be attempting to reduce the vulnerabilities created by overwhelming dependence on China while absorbing technologies emerging from the Ukraine war.CNAWS assesses that the emerging Pakistani force structure is increasingly oriented toward a compressed, high-intensity conflict characterised by long-range missiles, drones, electronic warfare, layered air defence and rapid sensor-to-shooter engagement. For India, the challenge will therefore extend beyond maintaining numerical superiority. Future military advantage will depend heavily on the ability to penetrate increasingly integrated Pakistani air defences, suppress mobile missile formations, disrupt command networks and sustain precision strikes under heavy electronic and unmanned-system pressure.

Operation Sindoor Changed the Requirement

Operation Sindoor demonstrated how significantly the India-Pakistan military equation had changed since Balakot in 2019. The confrontation between 7 and 10 May 2025 was fought substantially through stand-off weapons, air defence systems, drones, long-range air-to-air missiles, electronic warfare and precision targeting rather than through large ground formations.

India demonstrated that conventional military force could be employed against targets inside Pakistan while attempting to manage escalation below the nuclear threshold. Pakistan, meanwhile, employed Chinese-origin J-10C fighters, PL-15 beyond-visual-range missiles, drones and its existing missile inventory. The conflict also exposed the growing importance of integrated air defence and persistent intelligence, surveillance and reconnaissance.[1]

Indian government assessments subsequently stated that Pakistan attempted to strike numerous military locations in northern and western India using drones and missiles during the confrontation. According to India's Press Information Bureau, these attacks were intercepted through a combination of integrated counter-UAS and air-defence systems. India also targeted Pakistani air-defence infrastructure during its retaliatory operations.[2]

For Pakistan, the resulting problem was therefore larger than replacing ammunition expended during the conflict. Rawalpindi required a mechanism capable of threatening Indian targets at greater depth while simultaneously making Pakistani military infrastructure harder to strike. That requirement is increasingly visible in its modernisation programme.

The Army Rocket Force Command

The most consequential organisational development has been the creation of the Pakistan Army Rocket Force Command. Prime Minister Shehbaz Sharif announced the formation of the command on 14 August 2025, three months after Operation Sindoor. Pakistan described it as a formation equipped with modern technology to address multidimensional threats.[3]

The significance lies less in the name than in the institutionalisation of conventional long-range precision strike. Pakistan has traditionally maintained extensive ballistic and cruise missile capabilities, but much of the international focus on these systems centred on nuclear deterrence. The Rocket Force Command provides a dedicated structure for conventional missiles and guided rockets that can potentially be employed during conflicts below the nuclear threshold.

The force is already becoming operationally visible. In April 2026, the command conducted a training launch of the Fatah-II surface-to-surface system. Janes assesses the Fatah-II as having a maximum reported range of approximately 400 kilometres and notes that it was designed to provide Pakistan Army artillery formations with stand-off precision capability.[4] In May, the Rocket Force Command conducted another training firing involving the Fatah-4 ground-launched cruise missile. Pakistan stated that the weapon incorporates modern navigation and avionics and is intended for long-range precision engagement.[5]

This is important for India because Pakistan is attempting to expand its conventional response options between artillery and strategic nuclear forces. The underlying doctrinal requirement appears straightforward. If India can conduct calibrated strikes against terrorist infrastructure, airbases or military targets while remaining below Pakistan's nuclear threshold, Islamabad requires credible conventional weapons capable of imposing costs at similar distances without immediately escalating toward nuclear employment.

The Rocket Force Command therefore represents an attempt to create a more usable conventional deterrent. It also complicates Indian targeting. Road-mobile missile launchers are inherently more difficult to locate and destroy than fixed

military installations. A larger inventory of precision rockets and cruise missiles dispersed across multiple formations would increase demands on Indian ISR, counter-force targeting and air defence simultaneously.

Rebuilding the Air Defence Layer

The second visible adaptation is Pakistan's effort to strengthen air defence, particularly against low-altitude threats and unmanned systems. In September 2026, Pakistan Air Force imagery revealed several air-defence systems operating together for the first time. Janes identified the Chinese HQ-17AE short-range surface-to-air missile system alongside Türkiye's Aselsan ?ahin counter-UAS weapon and Korkut self-propelled anti-aircraft gun.[6] The combination is notable.

The HQ-17AE is designed for mobile short-range defence and can engage multiple airborne targets. Korkut provides gun-based protection against low-altitude aircraft and unmanned systems, while ?ahin is specifically intended for counter-UAS roles. Together, these systems address a problem increasingly evident from Ukraine, West Asia and Operation Sindoor. Expensive missiles alone cannot economically defeat mass drone attacks.

Pakistan therefore appears to be constructing additional defensive layers below systems such as its Chinese-origin HQ-9 and LY-80 families. This matters because future Indian operations would likely confront not one air-defence belt but a network composed of long-range surface-to-air missiles, medium and short-range interceptors, electronic warfare, counter-drone guns and fighter aircraft. Even if individual systems can be suppressed or bypassed, additional layers increase the number of sensors and weapons Indian planners must account for while creating more opportunities for mobile formations to survive the initial strike phase.

The J-35 Package Is About More Than Stealth

Pakistan's most ambitious prospective airpower development remains China's offer involving 40 J-35 fifth-generation fighters, KJ-500 airborne early warning and control aircraft and HQ-19 air and missile-defence systems. The Government of Pakistan publicly disclosed the Chinese offer in June 2025, shortly after Operation Sindoor. Janes subsequently confirmed that the package had been publicly announced by Islamabad, although the status, delivery schedule and final configuration of any acquisition remain uncertain.[7]

The J-35 naturally attracts attention because of its low-observable design, but the KJ-500 could be just as consequential. Modern air warfare increasingly depends on distributed sensors rather than the radar fitted to an individual fighter. An airborne early-warning aircraft can detect and track targets over a much larger area and pass targeting information to combat aircraft while allowing fighters to minimise their own radar emissions. A J-35 acquisition combined with KJ-500 support would therefore represent an attempt to build a more integrated Chinese-style combat network rather than simply add another fighter type. Pakistan is already moving in this direction with its existing fleet.

In April 2026, the PAF publicly displayed the JF-17 Block III carrying PL-15 beyond-visual-range air-to-air missiles for the first time. The aircraft had four PL-15s along with PL-10 short-range missiles. Janes noted that the imagery constituted official evidence that the long-range weapon had been integrated onto the Block III.[8] The implication is that long-range air combat is no longer confined to Pakistan's relatively small J-10C fleet. PL-15 integration across JF-17 Block III aircraft expands the number of Pakistani fighters capable of participating in long-range engagements.

For India, the relevant challenge is therefore the entire kill chain consisting of airborne warning platforms, AESA-equipped fighters, long-range missiles, electronic warfare and ground-based air defence.

Türkiye Is Becoming the Second Technology Pillar

China remains Pakistan's dominant defence supplier, but Türkiye is increasingly important in areas where Pakistan wants rapid access to operationally relevant technology. Pakistan and Türkiye held their twentieth High-Level Military Dialogue Group meeting in April 2026, with defence industrial cooperation and military capacity building among the principal subjects discussed. The following month, Pakistan Air Force chief Air Chief Marshal Zaheer Ahmed Baber Sidhu visited Türkiye and held meetings involving Baykar and Turkish defence officials. Discussions specifically included aerospace innovation, unmanned aerial systems and emerging technologies.[9]

The appearance of Turkish Korkut and ?ahin systems in Pakistani service provides physical evidence that the relationship is moving beyond meetings and exercises. The August 2026 Makkah Joint Defence Agreement between Pakistan, Türkiye and Saudi Arabia could deepen this further. Subsequent trilateral discussions included joint technology development and production as well as cooperation in unmanned and autonomous systems, electronic warfare and air defence.[10] For Pakistan, Türkiye offers an attractive complement to China. Turkish industry has accumulated significant experience in UAVs, precision weapons, electronic warfare, sensors and battlefield air defence. Pakistani access to this ecosystem allows Rawalpindi to diversify suppliers while potentially obtaining technology transfer and local manufacturing arrangements.

The New American Drone Opening

A more surprising development emerged on 16 September 2026. US drone company Powerus signed a memorandum of understanding with the Pakistan Army covering unmanned aerial systems and secured an initial undisclosed order. Reuters reported that discussions involved defence procurement, production and longer-term capacity building. Powerus has also indicated interest in developing technology and potentially manufacturing systems inside Pakistan.[11]

The agreement is strategically interesting because Pakistan has spent years becoming increasingly dependent on China for major conventional weapons. SIPRI data released in March 2026 shows that Pakistan's imports of major weapons increased by 66 percent between 2016-20 and 2021-25. China accounted for approximately 80 percent of those imports.[12]

The Powerus arrangement will not overturn that relationship. Chinese aircraft, missiles, frigates, air-defence systems and sensors are too deeply embedded in Pakistan's force structure. It does, however, indicate that Pakistan is looking for alternative technology streams. This could be particularly important in unmanned systems. The Ukraine war has produced rapid innovation in low-cost strike drones, interceptors, autonomous systems, tactical reconnaissance and counter-UAS technologies. Access to companies working with these operational lessons would allow Pakistan to supplement its existing Chinese and Turkish drone fleets with a third technological ecosystem. Pakistan's future drone force may therefore become more diverse rather than less.

Rearmament Despite Economic Pressure

Pakistan's modernisation ambitions are also visible in its budget. The 2026-27 defence allocation stands at approximately PKR3.01 trillion. Janes calculates this as an increase of around 16 percent over the revised 2025-26 figure. More importantly, expenditure allocated to physical military assets increased by approximately 39 percent to PKR925.8 billion.[13]

Reuters separately reported an approximately 18 percent increase in defence expenditure against the original previous-year allocation even as Pakistan reduced federal development spending while operating under IMF-related fiscal constraints.[14]

The increase in capital expenditure is more revealing than the headline defence figure because it indicates that procurement and equipment modernisation are receiving priority. Pakistan therefore faces a contradiction. Its economy continues to impose limitations on sustained military expenditure, yet the strategic requirement generated by India and the deteriorating internal security situation is pushing defence requirements upward. China's financing, technology transfer and relatively favourable acquisition terms remain critical to resolving this contradiction.

The Maritime Component

Pakistan's naval modernisation should be treated differently from the developments above. The eight-boat Hangor-class submarine programme was negotiated years before Operation Sindoor and therefore should not be interpreted as a response to the May 2025 conflict. Nevertheless, its entry into service is occurring during the same broader period of military restructuring.

Pakistan commissioned the first Hangor-class submarine in China on 30 April 2026, with the vessel subsequently arriving in Karachi in June. Four boats are being produced in China while another four are to be constructed in Pakistan under a technology-transfer arrangement. Pakistan says the submarines incorporate air-independent propulsion, modern sensors, advanced weapons and enhanced stealth.[15]

Their importance lies in survivability and sea denial. An eight-boat modern conventional submarine fleet would place additional demands on Indian anti-submarine warfare assets in the Arabian Sea while giving Pakistan a more persistent underwater presence. This does not directly address the vulnerabilities exposed during Operation Sindoor, but it contributes to Pakistan's broader attempt to complicate Indian escalation options across multiple domains.

> ***Strategic Assessment***
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> *Pakistan's military modernisation after Operation Sindoor should not be understood as a collection of unrelated procurement programmes. A discernible architecture is emerging. The Rocket Force Command creates a conventional long-range strike arm. The Fatah family provides progressively deeper precision fires. HQ-17AE, Korkut and ?ahin strengthen the lower tiers of air and drone defence. JF-17 Block III and J-10C aircraft armed with PL-15 missiles increase Pakistan's ability to contest the battlespace at beyond-visual ranges. The proposed J-35 and KJ-500 combination would extend this network into fifth-generation aviation and airborne battle management. Turkish cooperation broadens Pakistan's access to unmanned systems and air-defence technology, while the Powerus arrangement potentially introduces US-origin drone technology and industrial partnerships.*
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> *The objective is unlikely to be conventional parity with India across every service. Instead, Pakistan appears to be building sufficient capability in a narrower set of*

> *areas to prevent India from conducting another short punitive campaign at acceptable cost. That represents the central lesson Rawalpindi may have drawn from Operation Sindoor.*
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> *India's advantage during a future confrontation will consequently depend not only on possessing superior platforms but on maintaining an advantage across the complete sensor-to-shooter chain. Persistent ISR will be required to locate mobile launchers. Electronic warfare and cyber capabilities will be required to disrupt Pakistani sensors and communications. Suppression of enemy air defences will become increasingly important as additional Pakistani layers enter service. Indian air defence will simultaneously have to manage ballistic missiles, cruise missiles, drones and potentially larger salvos from the Rocket Force Command.*
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> *The contest is therefore shifting away from individual aircraft and missile comparisons. Pakistan is attempting to create an interconnected force in which missiles, drones, fighters, airborne surveillance, electronic warfare and air defence reinforce one another. China remains the principal technology provider, but Türkiye and potentially the United States are increasingly adding capabilities around the edges.*
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> *Operation Sindoor demonstrated the value of stand-off precision warfare. Pakistan's response suggests that the next India-Pakistan confrontation, if it occurs, is likely to be fought in an even denser environment of sensors, missiles, drones and electronic warfare. The strategic contest after Sindoor is consequently no longer simply about who possesses the longer-range weapon. It is increasingly about which side can find, track, disrupt and destroy the other's distributed combat network first.*

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