
Pakistan's Balancing Act Under Field Marshal Asim Munir: Mediating the Iran–United States Confrontation while Navigating Strategic Entanglements in a Multipolar Order

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Abstract

This article looks at the reasons and the process behind the emergence of Pakistan as the chief mediator between Iran and the United States in the 2026 encounter between the two entities that was led by Chief of Defence Forces (CDF) Field Marshal Asim Munir. The research uses a qualitative single case study design using a process-tracing methodology to explore the causal processes by which this historically marginalised Middle power has acted as a mediator, with Qatar and Oman being rendered unavailable by the conflict. The study is based on primary sources, such as official government statements, parliamentary archives and the diplomatic communications which are publically available, as well as literature and secondary sources, including peer-reviewed scholarship on strategic hedging, mediation theory, military diplomacy and civil-military relations. Theoretically, the analysis combines four concepts: Walt's (1987) concept of balance of threat, Goh's (2005) concept of strategic hedging, mediation typology of Touval and Zartman (1985), and Putnam's two-level games model (1988). Its key argument is that Pakistan's mediation efficacy was due to the interplay of three essential, yet independent, conditions: (1) its structural positioning; (2) institutional consolidation; and (3) transactional credibility. The counterfactuals indicate that other actors would have had disqualifying limitations that Pakistan did not: Saudi Arabia, China, Turkey and a hypothetical predecessor army chief. The article adds to the literature on middle-power diplomacy in that it shows how, under certain circumstances, structural dependency, which is usually regarded as a limitation of strategic autonomy, can be the very basis of the creation of credibility. It also builds on the existing hedging body of literature by offering an example of how postures used for hedging in defensive positioning can be redeployed as offensive diplomatic instruments during systemic crisis.

Keywords: *Pakistan Foreign Policy; Strategic Hedging; Iran–Us Conflict; Middle-Power Diplomacy; Military Diplomacy; Civil-Military Relations; Process Tracing; Multidirectional Balancing; Field Marshal Asim Munir; Mediation Theory*

Introduction

The first direct meeting between the United States and Iran since the 1979 Islamic Revolution was held in Pakistan in April 2026. The talks eventually resulted in a memorandum of

understanding that extended the ceasefire for sixty days and set up a nuclear negotiation track, brokered by Chief of Defence Forces Field Marshal Asim Munir, who had been in intense backchannel communication with top American and Iranian officials over the past few weeks (Bukhari, 2026; Council on Foreign Relations [CFR], 2026). The episode poses an analytical conundrum: why did Pakistan – a state which is usually described in the academic literature as being characterised by a range of issues, including political instability, economic fragility, structural dependence on multiple external patrons, and acute civil-military imbalances (Haqqani, 2005; Jalal, 2014) – appear as the only viable interlocutor? And in what circumstantial way did it become successful in a context where less well-resourced mediators and institutionalized mediators were not?

The questions posed here are not only bilateral Iran-Pakistan or US-Pakistan, but have more normative and theoretical implications. The mediation success of Pakistan can be explained systematically, not just as a fortuitous or contingent occurrence, and not merely as the result of personality or geopolitical coincidence: the case has implications for revision of dominant theories of middle-power behaviour, strategic hedging, and the interaction between structural dependency and diplomatic autonomy. Theory has generally approached dependency as a limitation: dependency is associated with limited foreign policy options for the countries that are dependent on other states for their economic survival and security provision (Cheema, 2024; Waltz, 1979). The Pakistani example of 2026 does not support this interpretation, however, because, under certain structural conditions, multi-directional dependencies can produce and not exhaust mediating leverage.

These questions are answered by a single case study of Pakistan's positioning in 2022-2025, which is mediated by the outcome of mediation (mid-2026). The choice of the case is made on the basis of its theoretical significance: the case is one of the hardest cases for conventional hedging theory, which states that structurally dependent states will hedge defensively and not project their diplomatic power offensively. The successfulness of that Pakistan is a condition that requires explanation.

Case selection and research design

The qualitative single case study design (Gerring, 2007; Yin, 2014) is adopted in this study. The case of Pakistan's mediation in the Iran–US conflict of 2026 is chosen because it is a theoretically interesting most-likely deviant case: a structurally weak, economically constrained, and institutionally fragile state that ends up with a foreign policy outcome that was not predicted. In line with Mahoney (2012) and Gerring (2007), the study views the case as a theoretically generative one, given that it is anomalous and can thus provide leverage to challenge mid-level propositions regarding hedging behaviour, middle-power diplomacy, and the convertibility of structural dependence.

The research design is based on a structured focused comparison (George & Bennett, 2005) which uses a consistent set of analytical questions at each of the case's temporal phases: What were the necessary causal conditions? In what order did they go? How were they linked with results? The structured comparison allows for comparison at each phase of the single case, that is, 2022-2025 positioning phase, the crisis of January 2024, the relationship-building phase with the Trump administration, and the mediation phase of 2026, without it being necessary to compare across nations.

Process Tracing

Process tracing is the most common analytic tool (Beach & Pedersen, 2013; Bennett & Checkel, 2014; George & Bennett, 2005). Process tracing involves uncovering the causal mechanisms, or the steps, decisions, and interactions, which connect initial conditions to outcomes. Appropriate

if the researcher's purpose is to explain why a particular event happened, and how it happened, in a sequence of causally related events (Mahoney, 2012).

The study employs what Beach and Pedersen (2013) call 'explaining-outcome process tracing', i.e. it starts from the outcome (Pakistan's mediation success) and works backward to see which processes were in place and which alternatives can be ruled out. In the theoretical literature four causal mechanisms are a priori identified and evaluated: (1) structural positioning, (2) institutional consolidation, (3) relational trust-building, and (4) spoiler management.

Sources and Triangulation

The study utilizes three types of sources with the aim of reducing the possible biases associated with any one type of source (Denzin, 1978). The sources of information are official documents from the Pakistani government, communiqués of the Foreign Ministry, parliamentary records of the 27th Constitutional Amendment, as well as the publicly available diplomatic exchanges of the US and Iranian governments, obtained from official archives and contemporaneous reporting. Secondary sources are peer-reviewed journal articles, policy papers from well-known think tanks (Stimson Center, Chatham House, Council on Foreign Relations and Belfer Center), and academic monographs. Tertiary journalistic sources are only utilized to help clarify the order of events in the article, but not to make causal inferences.

The triangulation strategy is a direct result of epistemological constraints on process tracing: causal mechanisms, in their turn, are not directly observable, and thus have to be inferred from several converging pieces of evidence. If an inference is drawn from more than one source category, and all these inferences converge, then the analysis must indicate that the inference has a high degree of confidence; if they come from different source categories, then the analysis must explicitly state the point of uncertainty involved in interpreting the inference.

Scope and Limitations

There are a number of caveats to note. Second, many diplomatic communications have not yet been made public, and the analysis must depend on those that have, which could be subject to selection bias in favor of those who wished to have their voice heard. Second, process tracing is only as good as the number of cases analyzed, so it is not possible to establish causation in any one case; it can show likely causal mechanisms and eliminate alternative explanations, but not rule out unobserved confounders with certainty. Third, as the study is based on the case of Pakistan as the unit of analysis, the internal Iranian and American decision making processes were treated as partially exogenous, thereby simplifying the causal account given. Such restrictions are mentioned when they are most directly relevant to specific inferences.

Theoretical Framework

Strategic Hedging and Multidirectional Balancing

Strategic hedging is the dominant theoretical framework used to understand Pakistan's foreign policy behavior, which is to adopt an ambiguous and sometimes contradictory posture towards competing great powers to ensure policy flexibility and prevent irreversible alignment (Goh, 2005; Lim & Cooper, 2015). The concept was first created by Goh (2005) for Southeast Asian states under the "structural pressure" of Sino-US competition and it has been expanded by Basrur and Sullivan (2021) to post-unipolar Asia. Cheema (2024) notes what he calls the 'dependency-autonomy paradox' – Pakistan's increased economic integration with China under the CPEC has been accompanied by a corresponding decline in foreign policy flexibility, as evidenced by the fact that Pakistan has voted in line with China in UN votes since 2020 to the extent of 87%.

This approach has been elaborated over the years, with the development of the notion of 'multidirectional balancing', as formulated by Ali et al. (2025) as 'the diversification of external relations in order to enhance security without necessarily choosing one patron over another. It is more than just a defensive move as it actively looks for other sources of leverage that can be used as substitutes for the existing ones. The hypothesis being tested in this paper is whether multipolar balancing (in a context of an overall crisis and the absence of any conventional mediator) can be transformed from a defensive strategy into a diplomatic offensive.

Middle-Power Diplomacy and Mediation Theory

The middle power diplomacy theory, which was first put forward by Cooper, Higgott, and Nossal (1993) and later developed by Jordaan (2003), suggests that middle-power actors choose multilateral approaches to solving problems, serve as mediators in international disputes in which they are not directly involved, and take advantage of institutional opportunities that are not open to great powers that are restricted by their rivalry. As a nuclear armed regional power with great military power and small economic and institutional strength, Pakistan shares the characteristics of what Jordaan (2003) described as 'emerging middle power' – it aims to leverage multilateral processes for its weight and influence that is greater than can be justified by its own material power.

According to mediation typology by Touval and Zartman (1985), there are three roles mediators can play: Communicators (information transmitters), Formulators (proposing bridging solutions), and Manipulators (exercising leverage to get agreement). In 2026, Pakistan's mediation was complete and went through all three stages: as a communicator at the backchannel level of the discussions, as a formulator in the Islamabad round of talks, and as a manipulator with personal leverage over both parties in the final round of talks in Switzerland. Theoretically important is this steady change of mediators which suggests that Pakistan was not just a neutral mediator, but an interested party whose cooperation was appreciated by both parties.

Two-Level Games and the Military-Diplomacy Interface

The two level games model developed by Putnam (1988) gives useful analytical leverage in the case of Pakistan. International negotiations are at the same time caught up in domestic political games, as negotiators are required to please the international partner (Level I) as well as the domestic partner (Level II), and what is acceptable at the international level is what is acceptable at the domestic level. This in a democratic polity gives rise to what Putnam calls 'win-sets': the set of international agreements that would pass domestically.

A Pakistani case offers a unique form of the two-level games. The domestic Level II game was reduced, as the foreign policy process under Munir was largely institutionalised in a single entity, the CDF, and subject to little parliamentary oversight and civilian counterweight, as observed in Pakistan's civil-military relations literature (Jalal 2014). There did not exist a meaningful parliamentary ratification requirement for Munir nor a civilian foreign minister who could veto military diplomacy. This institutionalisation, which was non democratic by democratic standards, but had continued along the civil-military course of Pakistan's negotiating position (see Section 4.1), had certainly widened the scope of Pakistan's negotiating position, making credible commitments easier to make and harder to withdraw from. This is a theoretically significant variation on Putnam's original model: In very "central" foreign policies, those of military-dominated states, the two-level game is partially reduced to a one-level game, with structural consequences for negotiating capacity.

Balance-of-Threat Theory and Structural Positioning

Walt's (1987) balance-of-threat theory offers a useful complement to the theory of Pakistan's usefulness as an interlocutor in both the US and Iran. Walt also believes that assessment of threats is a weighing process between the state's threat assessment and the state's perceived threat, which is determined by the aggregate power, geographic proximity, offensive capability, and perceived intentions of the state. On all three, Pakistan had no offensive military capability to pose threat to either the US or Iran, it was not in a strategic position vis-à-vis the US or Iran, and also most importantly, its foreign policy ambiguity had ensured that it remained non-threatening to both countries. Such a non-threatening profile was a structural prerequisite for mediation credibility which more powerful and/or more obviously aligned states (Saudi Arabia, China, Turkey) could not duplicate.

Combined, these four frameworks lead to an integrated theoretical proposition that Pakistan's mediation capacity was the result of a unique structural configuration that brought together multi-directional dependency (hedging), non-threatening profile (balance-of-threat), institutional centralisation (two-level games), and the lack of alternatives (mediation theory) simultaneously for the first time. None of them is enough – it is the interaction between them that gives the explanatory power.

Structural Foundations of Pakistan's Mediation Capacity

The Institutional Architecture of Pakistani Foreign Policy

It is essential to understand the mediation role of Pakistan in the context of the historical development of Pakistan's civil-military relations. Parliament has never shown satisfactory results in asserting its agency over foreign policy since Independence in 1947 and that is why the foreign policy has been under the control of either the Military or the civil bureaucracy or both (Jalal, 2014; the Military and Foreign Policy in Pakistan, ResearchGate 2022). From October 1958 onwards, the military was the 'principal actor' in Pakistani politics, with the army chief becoming the 'de facto foreign policy decision-maker' for Pakistan on matters concerning Pakistan's most important relationships, India, Afghanistan and the United States (Jalal, 2014). This sense of history matters analytically because that's not just Munir's prerogative; it's an evolution of a structural disposition that has occurred throughout the tenure of his predecessors.

A comparison of recent army chiefs illuminates some of the institutional features of Munir's brief. Selective cooperation with Washington and maintaining the military's strategic depth in Afghanistan were the two elements of Gen. Ashfaq Kayani (2007-2013)'s approach to Pakistan-US relations in the decade after 9/11 (Brookings, 2013). Under General Raheel Sharif (2013-2016), he also adopted the media-centric leadership style and had to deal with civilian foreign policy framework in his foreign affairs (Wilson Center). Gen. Qamar Bajwa (2016–2022) oversaw the dynamics between the USA and China and the relationship between the CPEC and Beijing, having regular chats with the American officials, and openly defending and promoting civilian governance principles, while undermining them (Al Jazeera, 2022). None of these predecessors enjoyed the level of institutional consolidation which Munir had since the passage of the 27th Constitutional Amendment in November 2025, which consolidated all three service branches and the Strategic Plans Division under a new CDF post. This is a constitutional shift unprecedented in Pakistan's history, which qualitatively transformed the dynamics of decision making in military diplomacy in such a way that the two level domestic game has been reduced to a one institutional mechanism.

Geographic and Relational Access: The Structural Precondition

No other mediator could have the same structural precondition as Pakistan's and it was this that formed the foundation of its mediation power. This access was created via three interwoven aspects: geographic, relational, and ideological.

Pakistan has roughly 900-kilometer land borders with Iran and bilateral relations between the two are structurally important, rather than a policy decision, for Pakistan (Modern Diplomacy, 2025). The ongoing tit-for-tat strike crisis has not disrupted these cross-border security coordination channels, as both sides knew they needed a mechanism in place to coordinate security measures against the common threats of militants in both nations, especially Jaish al-Adl and the Balochistan Liberation Army (SAIS Review, 2024). This structural connectivity had led to a familiarity of institutional connectivity between the Pakistan Army and Iranian security establishments that no mediator from afar could have built up in such a short period.

Relationally, Pakistan's relationship with the two was a product of years of separate mutual cultivation. Pakistan had been a key ally of the United States in the initial stages of their security partnership established through the SEATO and CENTO pacts and continued and strengthened in the post-9/11 counter-terrorism cooperation framework (2005, Haqqani). The relationship between Iran and Pakistan had been the most mellow, and remained so despite the dawn of the Islamic Revolution, the Iran-Iraq War, US sanctions, the 2024 strike crisis, and more, due to their structural need for each other for border management and energy trade (Iran-Pakistan Relations, Oxford Academic, 2026).

Ideologically, Pakistan's refusal to recognize Israel, which was continuously followed by its civilian and military governments, held significance for the city of Tehran. Unlike Pakistan's other allies Turkey, which had ties with Israel, and Saudi Arabia, which was involved in normalisation talks, other countries of the Muslim world were standing with Pakistan in an uncomplicated position of support for the rights of the Palestinians, which Iran's post-Khamenei leadership could use to show that Pakistan's mediation was not being influenced by the Israelis. This ideological stance, which was seen in the Pakistan policy literature as a diplomatic drawback to the west would serve as a positive reference point in 2026 to Tehran (CFR, 2026).

Energy Dependence as Motivation

One area that is often overlooked in Pakistan's motivation for mediation is the country's severe energy shortage. At present, Pakistan's economy is already struggling in the wake of the IMF structural adjustment programmes and chronic fiscal deficit, it imports energy from the Gulf states for over 85% of its consumption and simultaneously imports Iranian electricity for about 34 megawatts of the daily needs of the borderland populations (Chatham House, 2026; Modern Diplomacy, 2025). Iran–US conflict broke out on the 28th of February 2026, immediately putting the two supply chains in danger. The government's emergency austerity measures, while not directly affecting the economy, included four-day working week for public employees and temporary closure of schools, thus putting the economic cost of regional instability directly before the public (Chatham House, 2026). This vulnerability on the economic front was a strong structural impetus for mediation: Pakistan's agenda was not one of a neutral third party but a state whose economic interests were far from being served by regional instability. This is an instrumental aspect of Pakistan's mediation that is counter to the narrative of the 'neutral broker' and aligns with the view of effective mediators as those who are interested—rather than truly neutral—Parties, as noted by Touval and Zartman (1985).

The January 2024 Strike Crisis: A Pivotal Inflection Point

Without the January 2024 tit-for-tat strike crisis, there is no way to comprehend the mediation that took place in 2026. The Islamic Revolutionary Guard Corps (IRGC) has launched missile

and drone attacks against the Balochistan province of Pakistan, killing two Pakistani children, in the first foreign military attack against Pakistani territory since the 1971 war. As a response, Pakistan launched the first military operation on Iranian soil since the end of the Iran-Iraq War in 1988, Operation Marg Bar Sarmachar, using its drones and aircraft to strike Balochistan Liberation Army camps in Sistan-Baluchestan province (2024 Iran–Pakistan Conflict; MEI, 2025).

The crisis is of importance for the mediation of 2026 for three reasons. First, it showcased the resilience of the bilateral relationship: it was within 10 days of each other's military strikes that ambassadors were restored, and within 14 days of the strike of the formal security cooperation expansion was announced, demonstrating the structural imperative that binds the two neighbours (SAIS Review, 2024). Second, it showed a serious lack of intelligence: when it comes to the strikes, it turned out that strategic circles in Pakistan had concluded that Iran's IRGC had authorised them, not the civilian government, and that Pakistan did not have adequate communication channels to the IRGC command structure (Stimson Center, 2026). The gap would become the issue that would be at the heart of the 2026 mediation, and would require Munir to visit Tehran in April 2026 personally. Thirdly, it showed that Pakistan had the will to put pressure on Iran when its sovereignty was violated, adding more credibility to its capacity to play a role in bringing Pakistan and Iran closer together, given that Pakistan was not playing appease games with Tehran.

Process Tracing the Mediation: From Positioning to Outcome

Phase I: Institutional Consolidation and Transactional Trust-Building (2022–2025)

The leadership change of Munir as Chief of Army Staff in November 2022 was a first step in a gradual shift in Pakistan's strategic stance. Three institutional initiatives in this phase set the prerequisites for the mediation in 2026.

The first was the establishment of the Special Investment Facilitation Council (SIFC) in 2023, which has been headed by the prime minister with a reserved seat for the army chief, which had shifted the military to a new position as main coordinator of the country's foreign investment policy. The SIFC's original investment inflow target remained unfulfilled, but the institutional innovation put Munir in the role of de facto CEO of Pakistan's foreign economic affairs, a job that his predecessors did not even consider themselves as occupying (Chatham House, 2026). This was an expansionist institutionalization process that followed the historical process described by Jalal (2014) although it was a qualitative leap in the formalization of the military economic power. Second, the cultivation of what Munir called the '3Cs' framework, cryptocurrency, critical minerals, and counter-terrorism, showed a transactional approach by the Trump administration. A credible counter-terrorism arrest came after the 2021 Kabul airport bombing which claimed thirteen US lives, the World Liberty Financial memorandum of agreement signed in January 2026 by Munir, and the critical minerals partnership, which was grounded in resources and would justify continued US involvement (The Diplomat, 2026; Chatham House, 2026).

Third, the November 2025 27th Constitutional Amendment, which was the culmination of the unification process and made all three branches of service a single command, was the institutional culmination of the consolidation phase. Analytically, the domestic two-level game (Putnam, 1988) was affected by this constitutional change as Pakistan's negotiating posture no longer needed to be coordinated between the competing service bureaucracies and all the commitments made by Munir had institutional weight of the entire defence establishment.

Phase II: The Iran Conflict Outbreak and Pakistan's Positioning (February–March 2026)

On 28 February 2026, US–Israeli military operations against Iran began, resulting in a structural opportunity for Pakistan's mediation. The death of Supreme Leader Ali Khamenei sparked mass

protests in Pakistan's main cities, including attacks on the US consulate in Karachi—where twenty people were killed when the consulate was partially breached—posing a domestic challenge in the form of a 2-level game for Munir that would not be settled easily (Chatham House, 2026). Beyond condemning the strikes as a violation of international law, Pakistan was not specific about Khamenei's killing, which kept the strike useful to both sides (Stimson Center, 2026). Such a diplomatic formulation is representative of the hedging logic described in Section 3.1, which was not a lack of resolve but a part of the strategic plan.

The response of Pakistan is different from the regional states. Saudi Arabia, as usual, remained silent about the strikes, which were tacitly in favor of the US-Israel axis. Turkey denounced the strikes, but it did not have institutional access to either Tehran or Washington's security arenas that would put it in a place for it to act as an interlocutor. China voiced concern, but it was hampered by the fact that it was seen as being aligned with Iran and American firms were listed as sanctions violators. No other options were available—historically Qatar and Oman had been US-Iran "back-channels" but both had been attacked by Israel and Iran respectively. The necessary but not sufficient condition for emergence of Pakistan is the elimination of these established mediators, Phase III identifies sufficient conditions.

Phase III: Backchannel Communication and Ceasefire Architecture (March–April 2026)

The key that Pakistan used in establishing its structural positioning as active mediation was personal back channel communication on both sides at once. Munir cultivated the relational foundations of Washington's trust in his cultivation of what Trump officially described as 'an exceptional personal relationship' (CFR, 2026; National Interest, 2026) with the President during his formal visit to Washington, the first by a Pakistani Armed Forces chief in the country without any civilian accompaniment.

Munir was able to initiate parallel diplomacy via telephone with Vance, Special Envoy Steve Witkoff and Iranian Foreign Minister Abbas Araghchi on the same day, April 5, 2026, one day before Trump declared publicly that the ceasefire negotiations would start on April 6 if Iran stopped hostilities (National Interest, 2026; The Diplomat, 2026). The ceasefire was announced by the Pakistani PM Shehbaz Sharif on 7 April and formal US-Iran announcement on 8 April.

The Islamabad talks of 11–12 April 2026—the first direct high-level US-Iran contact since 1979—were co-chaired by Munir and conducted on Pakistani soil. That the talks yielded no substantive breakthrough is analytically important: it demonstrates that Pakistan's mediation capacity, while sufficient to convene the parties, was not sufficient independently to resolve the underlying substantive dispute over nuclear enrichment, sanctions architecture, and regional force posture. This distinction between convening capacity and resolving capacity is underappreciated in the popular narrative of Pakistan's mediation success.

Phase IV: Shuttle Diplomacy, Spoiler Management, and the MOU (April–June 2026)

The first direct high-level US-Iran contact since 1979 took place on Pakistani soil in Islamabad on 11-12 April 2026 and was co-chaired by Munir. It is analytically significant that the talks failed to produce any substantive progress; they were able to bring the parties together but not, on their own, settle the substantive issue of nuclear development, the design of sanctions and the regional force posture. The separation between convening capacity and resolving capacity is not given enough credit in the popular story of Pakistan's mediation achievements.

Shuttle Diplomacy and Spoiler Management will be the focus for Phase IV, April – June 2026. For Phase IV, April – June 2026, focus will be on Shuttle Diplomacy and Spoiler Management and the MOU.

The fourth stage of the mediation process was marked by the most important causal mechanism—the first visit by any regional military leader since the start of the war, of Munir to Tehran in late

April 2026. The visit was analytically important as it covered the structural deficit discovered following the strikes in January 2024 – lack of direct contact with the IRGC command. Munir's efforts to develop Pakistan's mediation sphere were not limited to the civilian foreign policy sphere of Iran but extended to the key institutional actor in the Iranian security decision-making process, the Revolutionary Guards (Stimson Center, 2026).

During this time the spoiler management challenge was severe. The attack on the Saudi Arabia's Jubail Petrochemical Complex, which was interpreted in Pakistani strategic circles as an attempt by IRGC hardliners to sabotage the ceasefire, pushed Pakistan's ability to keep both countries fooled on an escalation track. The strike on Jubail Petrochemical Complex in Saudi Arabia, which was understood within Pakistani strategic circles as a possible effort by the IRGC hardliners to derail the ceasefire, was a test of Pakistan's capability to maintain simultaneous credibility with both countries under the conditions of renewed escalation (Stimson Center, 2026). The mutual strategic defence pact signed by Pakistan and Saudi Arabia in 2009, which declared an attack on the Kingdom as an attack on Pakistan, was left unmentioned: Islamabad was careful not to trigger the SMDA, instead focussing on the mediation side of the agreement. This was a major diplomatic move, which was in line with the analytical logic of hedging as expounded in Section 3.1, since it could raise questions about Pakistan's commitment to mutual defence.

The memorandum of understanding (MOU) signed at the Bürgenstock Resort on 17 June 2026—co-witnessed by Pakistan and Qatar—contained enhancements to Pakistan's negotiations that it had made through multiple rounds of drafting: a 60-day ceasefire extension, reopening of the Strait of Hormuz, lifting of the US naval blockade, partial sanctions relief to Iran, and the formation of a dedicated nuclear negotiation track, with Pakistan and Qatar serving as co-chairs of the political oversight committee (Bukhari, 2026). The MOU was not an actual resolution, but rather a transitional formulation and its validity was dependent on the nuclear negotiation track which Pakistan had limited control over.

Counterfactual Analysis – Why not Alternative Mediators?

The steps of counterfactual analysis enhance the causal inference process by establishing if the outcome would have been obtained under other conditions (Fearon, 1991; Tetlock & Belkin, 1996). Four other mediators are worth a systematic look: Saudi Arabia, China, Turkey and even an imaginary former Pakistani army chief.

Saudi Arabia

Saudi Arabia had several apparent qualifications for the mediation: it had economic leverage over the Pakistani government; it had a long-standing security pact with the United States and it was the biggest Sunni Muslim state in the region. There were three structural disqualifications, however. First, bilateral relations between Iran and Saudi Arabia were defined by hostility based on the sectarian conflict between Shia and Sunni, on the Yemeni proxy war, and on the different hegemonic ambitions of both countries, which Iran lacked any credibility with. Second, the SMDA of September 2025 had cemented Saudi Arabia's cooperation with the US-Israel security framework, rendering it unnecessary to trust its intentions toward Iran. Thirdly, Saudi Arabia was revealed as an active player in the conflict rather than a neutral observer in April 2026, when it was attacked by the Iranian regime in the Jubail Petrochemical Complex. Saudi Arabia therefore meets the non-threatening profile criterion of Walt's (1987) threat-balance model.

China

In the past, China had been involved in the Iran-Pakistan strike crisis, acting as a mediator to provide a diplomatic platform for de-escalation (SAIS Review, 2024). But China's geopolitical situation was decidedly different in 2026. The U.S. view of China as a strategic competitor

alongside the Iran-Russia partnership and U.S. sanctions labeling Chinese firms as sanctions offenders created a basic lack of trust with the Trump administration. Furthermore, China's institutional interest in maintaining its Iranian imports at below-market prices led to the creation of apparent conflicts of interest which made it appear shady to both Washington and, perhaps more importantly, to Iranian reformists who hoped to secure a waiver from the sanctions. In addition, given the paucity of literature on personal diplomacy in great-power relations, Xi's mediation role in 2026 was further limited due to the lack of a similar personal diplomatic connection between him and Trump as the one between Munir and Trump.

Turkey

There are no better options than Turkey, a member of the North Atlantic Treaty Organisation (NATO) that has a history of involvement in Islamic diplomacy and has already had contact with both Iranian and American officials. Three drawbacks, however, impeded Turkey's candidacy. First, as a member of NATO, and in some respects formally allied with the US-Israel operation, Turkey faced credibility issues with Tehran like, but less serious than, those Saudi Arabia faced. Second, Turkey had enjoyed diplomatic relations with Israel, which could not be tolerated by the Iranian leadership that was dominated by the IRGC and trusted no one else. Third, Erdogan did not have the personal rapport that Munir had developed with Trump, and the US-Turkey relationship had been strained on a number of occasions in recent years over the purchase of the S-400s, Cyprus, and Greece—all of which meant that the personal "relationship capital" with which to launch such a diplomatic initiative was limited.

A Hypothetical Predecessor: General Bajwa or Raheel Sharif

The most theoretically illuminating counterfactual is not another Pakistan but another Army chief, namely General Bajwa (2016-2022) or General Raheel Sharif (2013-2016) who could have had this mediating role. This is an instructive counterfactual because it strips out the common structural variables from all Pakistani army chiefs and leaves out the individual-institutional variable.

Unlike Munir, Bajwa maintained regular contacts with the US but not with the Trump administration's President; he did not work on the personal level that Munir had, as Trump's second term had already started by the time of Bajwa's retirement. Raheel Sharif's rule (2013-2016) was before Trump's first election. At the base of it, both would have had to coordinate with a host of civilian foreign policy institutions, and both would have been subject to such constraints that they would have hampered the 48-hour decision cycles necessary for the mediation of 2026. This counterfactual underpins the Pakistani mediation's argument that the November 2025 constitutional change was a precondition, but not a sufficient one, to Pakistan's mediation capacity: even a Pakistani army chief with personally close ties to the USA would not have been able to operate the same way in terms of speed, authority, and credibility without it.

Constraints, Competing Interpretations, and Analytical Limits

The IRGC Access Deficit

The most important institutional obstacle to Pakistan's mediation role was the difference between the institutions of Pakistan's existing channels of communication, which were mostly with the civilian government of Iran, and the dominant decision-making body of the IRGC, headed by post-Khamenei. Pakistan officials admitted that it is difficult to have a direct channel with the Revolutionary Guards command, and from the January 2024 crisis, strategic circles inside Pakistan have come to understand that the IRGC's operational decisions are not made based on the bilateral relationship established at the civilian level (Stimson Center, 2026). This institutional void was filled in by Munir's ad hoc meeting with IRGC commanders in Tehran. It is a

methodological limitation of this study that it does not allow a conclusive answer on whether a durable communication architecture with the IRGC has been set up, as it is not possible by available evidence due to the opacity of the IRGC's internal decision making.

The Democratic Legitimacy Question

There is a tension throughout interpretations of the mediation over its democratic legitimacy deficit. Issues related to the lack of democratic mandate for foreign policy in the military sphere—evident in Pakistan's capacity to mediate—were identified by a few analysts (Georgetown Journal of International Affairs, 2020; Jalal, 2014). This view is that the 27th Constitutional Amendment was not an institutional reform but consolidation of Praetorian power because the composition of the Parliament was also affected by the crackdown on PTI by the military. The mediation success, on this reading, came at the price of a compromise with standards of democratic governance which have consequences on the long run stability of Pakistan's institutions. This normative critique is analytically separated from the causal question of how the mediation worked out, but is nevertheless related; the institutional configuration that facilitated successful mediation is also a failure of democracy in the governance process.

The Economic Extraction Hypothesis

A third reading of Pakistan's role is that instead of being motivated by a genuine desire for peace or stability in the region, the Pakistani mediation efforts were motivated by the hope of economic benefits like investment, debt repayment and sanctions removal. Both the MEI analysis (2025) and the analysis by Chatham House (2026) point to the fact that Pakistan's expectations of tangible economic benefits from the SIFC initiative had not yet been realised, and that a part of the motivation behind Pakistan's mediation was due to a hope that the United States would accept the offer of economic concessions. This is not a contradiction to the structural analysis outlined in this article, in which states are able to have both security and economic interests with regard to the benefits of diplomatic service in the region. As of mid-2026, it is still not clear whether Pakistan gained significant economic benefits, commensurate with its mediating contribution, or not, and whether those benefits can be measured over time.

China's Role: Facilitation or Constraint?

In this article, the focus will be on China's role as a limiter of its own candidacy as mediator. But there is another way to read it that the behind-the-scenes role played by the Chinese in mediating Pakistan was more important than what the public documents suggest. China's centuries-long commercial and geopolitical ties with Iran, its involvement in the 2024 strike crisis de-escalation and its desire to reopen the Strait of Hormuz for its purpose of energy imports, gave Beijing an incentive to support Pakistani mediation—rather than oppose it—without going public with its sponsorship. If this is accurate, then the apparent autonomy with which Pakistan has conducted the mediation process has been aided by the acquiescence of the Chinese, for which they have yet to publicly apologize. This is an important analytical question that should be explored in future research on which diplomatic records of all kinds will have access.

India's Strategic Response

The paper has also pointed out that it is probable that India is worried about the diplomatic rehabilitation of Pakistan, but cannot delve deeply into New Delhi's strategic reaction in this article. Indian analysts and policy makers have good reasons to challenge Pakistan's role as a mediator: They could state, for example, that the degree of institutional authority attributed to Munir is counter to his diplomatic qualifications, or that the ability to mediate in Pakistan was facilitated by the same ambiguity of intent that has always allowed Pakistan to host groups hostile

to India. India's ability to use its own bilateral ties with the US, Iran and regional allies to wear down Pakistan's gains in diplomatic capital will be a key factor in the intermediate term viability of Pakistan's strategic realignment.

Conclusion: Theoretical Implications and Future Research

Based on the process-tracing analysis of Pakistan's 2026 Iran–US mediation, this article has made a case for the confluence of three conditions, all of which were necessary but none was sufficient, namely structural positioning (geographic and relational proximity to both sides); institutional consolidation (concentration of civil-military power after the 27th amendment); and transactional credibility (systematic cultivation of personal trust with the Trump administration through the '3Cs' framework). A counterfactual analysis of the possible alternatives for mediators (Saudi Arabia, China, Turkey, and hypothetical predecessors to the army chiefs) confirms the inference that none of the alternatives that existed at the time had all three conditions.

In theory, the case contributes to the pertinent literature in three ways. First, it offers an extension of the strategic hedging approach (Goh, 2005; Basrur & Sullivan, 2021), by showing that multidirectional dependency can be used offensively, when conditions of systemic crisis deplete the conventional mediators. The various aspects of Pakistan's reliance on the United States, Gulf states, China and Iran (arguably creating limited autonomy, as discussed in the previous literature; see Cheema 2024) were the very things that made it believable to everyone. The theoretical revision suggested is that such a switch from defense to offense in diplomacy is based on a structural trigger, namely the simultaneous unavailability of less dependent alternatives. This is a proposition, not a general.

Second, the case extends Putnam's (1988) two-level games model to the particular context of military-dominated foreign policy. In democratic societies, Putnam's model suggests that the constrained win-sets—that is, narrow domestic political space in democratic systems—restrict the negotiating flexibility of international negotiations. The international flexibility in Pakistan's case was paradoxically greater than the domestic constraints because the foreign policy apparatus was under the control of the military and there were no meaningful parliamentary requirements for the government to obtain before it made credible commitments to the outside world which would be expected to be the reservoir of last resort from which a civilian government under electoral competition would draw its foreign policy policy. This result has implications for the study of the nature of diplomatic capacity in a hybrid type of political system that forms the basis of the bulk of the developing world.

Third, the case is useful for the mediation literature of demonstrating that the typology of mediator roles created by Touval and Zartman (1985) can be used sequentially as well as categorically: Pakistan crossed sequentially through all three roles, in a defined sequence, following the development of the conflict from backchannel to summit to shuttle diplomacy. A sequence of role adoption and the institutional conditions necessary to make such role flexibility possible should be further developed theoretically.

This analysis gives rise to several lines of research. Whether the MOU signed in June 2026 is durable on the nuclear negotiation track or is going to fall apart due to the resistance of the IRGC is an issue that has to be addressed through longitudinal research which will have significant implications for the durability of Pakistan's mediations. Comparative study is required to examine the validity of the three-condition model of Pakistan's unexpected mediation success in other cases. When the diplomatic correspondence is declassified, however, archival research will be required to assess how much China was underplayed in this and other narratives.

It is not really an anomaly, and it is not full either, the 2026 Pakistan-mediated ceasefire between Iran and the US. It is rather an anomaly when subject to the analysis of Pakistan's foreign policy course, viewed through the prism of the country's economic fragility and institutional instability

as is common in popular and much scholarly literature. It seems less bizarre when viewed through the prism of the structural configuration that was achieved at the start of 2026: when relational access, institutional authority, and personal credibility were all present to the same person at the same time, at a time when all other structural options had been foreclosed. But it is lacking in its entirety, until the root cause of the conflict (the nuclear program, regional strategy, and US sanctions architecture in relation to Iran) is resolved. The success or failure of the durable repositioning or a temporary diplomatic windfall will largely depend on the developments that will unfold outside of Islamabad's control.

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