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KEYWORDS	ABSTRACT
Intelligence failure, early warning, Balochistan, Baloch insurgency, ISI, tribal integration, artificial intelligence, autonomous drones, counter-UAS, counterterrorism, Pakistan	The concept of intelligence failure is a constant refrain in Pakistan's security establishment when it comes to the various rounds of shooting sprees that have been going on in Balochistan. This is a way of hiding more than showing. It cannot tell if someone interpreted a warning correctly but it did not pass through to a decision-maker, or it was meant to be handed out to a decision-maker but passed no one up the chain of command, or if it was meant to be a warning but wasn't recognized as such in the first place. The paper draws on the recent literature on intelligence studies for developing a four-dimensional framework for the analysis of warning, comprising analysis, process, politics, and tribal integration, and extends the framework by adding a tribal and administrative geography dimension for Balochistan. This framework is used for the ongoing insurgent violence by Balochs that has brought terror to the multi-district attack in January–February 2026; the hijacking of Jaffar Express on March 2025 and the live tempo of attacks through mid-2026. The analysis reveals a less effective warning chain – tactical, short horizon analysis is often sufficient, as the process is fragmented within a crowded intelligence bureaucracy, political unwillingness to rethink resource allocation in favor of the central warning chain, and an unreliable tribal information network results in dampening of warning value if there is any. Finally, the paper offers a suite of institutional (as opposed to operational) recommendations to help reduce the disconnect between what the state knows and what the state can do.
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Introduction

Each mass killing in Balochistan since the mid-2000s has occurred under the same conditions; the officials and pundits are united in blaming it on an "intelligence failure," a handful of officers are shuffled off to the shadows, and the question of which particular "intelligence failure" and at what point in the chain is never answered. The pattern has been replicated nearly verbatim in the recent series of coordinated attacks in January–February 2026, made in at least nine districts of

Balochistan, and the fairly high volume of insurgent activity that has continued since that time up to mid-2026.

The Pakistani Commentary pointed out the "intelligence failure of the highest order" and the army's leadership reportedly gave the Inter-Services Intelligence (ISI) directorate an "ultimatum" to perform or perish and indicated a reshuffle was imminent.

The brief decision is not wrong – it is simply too coarse to be of any use. "Intelligence failure" is essentially four analytically distinct failures in one: a failure to properly analyze available information; a failure of the bureaucratic system to get the information to the people who need it; a failure of political will to accept and act on an unwelcome warning; and in Balochistan's case, a failure of the human and tribal networks through which early indicators would normally emerge. Roughly, all four are treated as synonymous, resulting in the wrong lesson being learned every time – that reorganizations can simply be reallocations of people without any changes to process, that purges are punishments for analysts' decisions made by their principals, and that security is simply a response to a governance and legitimacy issue.

The purpose of this paper is to suggest that a more correct diagnostic vocabulary is a prerequisite of a more correct remedy vocabulary. It develops a four dimensional structure (analysis, process, politics and tribal integration) and utilises this structure to analyze the current insurgency by the Balochs. The intent is not to exude blame after the event, but to try to find, with greater precision than the current public debate, where in Pakistan's warning chain are the links that are weak, and where they are, indeed, holding. The paper also examines one variable that is actively being at play in the warning problem and does so as the problem unfolds in real-time: the employment of autonomous, or even semi-autonomous, aerial drones — by the insurgents and the state. There is no fifth independent dimension added; instead this runs across, complicates and intensifies all four of the existing ones and is treated as such.

From Binary Verdicts to Multidimensional Diagnosis

For long, considering failure as an entity has been avoided in literature on intelligence studies. The classic examples of surprising wars are those of Yom Kippur, which showed up a particular set of cognitive and organizational pathologies, not just that the decision maker failed to be competent, but that a "cry wolf" effect (repeated false alarms make the decision maker less alert to the real alarm) occurred; that the "mirror imaging" effect (using one cognitive approach when in reality one is needed entirely different) occurred; and that the "weak signal in the sea of noise" (analysts failed to detect a weak signal amidst all other signals) occurred. These are diseases of very different intelligence services, and of very different foes, and therefore are not idiosyncratic.

Recent scholarship have moved away from a binary notion of warning success/failure toward multi-dimensional notions of the effectiveness of warnings. Three influential formulations have distinguished warning performance into three areas: a "production" dimension (did a timely, clear, and actionable warning get produced); a "communications" dimension (did the communication channels within and between organizations get the warning to the people who needed it?); and a

"political" dimension (did the warning get translated into a response once it was delivered to decision makers, who warned, were receptive enough to do so? Finally, the politicization of intelligence has been explored elsewhere, and even fully developed democratic intelligence agencies have the capacity to be warned, warned incorrectly, or warned against even valid warnings, on the basis of reasons other than intelligence.

Balochistan has a feature which is not well specified in intelligence studies based mostly on Middle Eastern and Western case material: a security architecture, deliberately designed to rely on a parallel, semi-autonomous tribal information system. But it is the Levies, an almost entirely rural constabulary force that has historically been responsible for policing rural Balochistan in place of the regular police, that have been deployed instead, and are subject to local and administrative systems as far back as the colonial days of the Sandeman system that gave these hereditary sardars police powers in return for some autonomy and patronage. Where that system operates, it also – operationally – is a human intelligence network – local recruits who are related and know the local language – where the regular security apparatus can't penetrate. If unsuccessful in being eroded, propped up by a handful of pro-state sardars or simply dismembered in some cases, such as that of the Balochistan Levies being folded into the provincial police in 2025, the state not only loses a form of policing, but one of its most granular early warning systems. This paper, therefore, adds another dimension, namely, Tribal Integration, which is analytically distinct from the above three described analysis-process-politics dimension, but unique to the administrative geography of Balochistan in which there is a failure mode.

A Four-Dimension Diagnostic Framework

The framework represents each escalation of violence as the end of a four-part escalation chain. An outage at any one component can yield a result that appears to be a total failure — which is why the blunt statement is so unhelpful. The four dimensions are briefly summarized in Table 1 and described in detail below.

Analysis

The analytical dimension doubts the validity and value of the raw reporting that comes from the intelligence community, including signals intercept reports, human sources (humint) reports, open source (osint) indicators and liaison reporting from allied services to the intelligence community, and questions whether reports can be synthesized into a valid, timely, decision-useful warning. Opposing fault of assuming a succession of incidents at district level will not be connected to an orchestrated attack, or of magnifying capacity when a shock occurs and a purely defensive approach is adopted, are examples of failure caused by a lack of understanding. An example of failing to understand is assuming that a series of district-level incidents are not connected to an orchestrated attack; another is assuming a higher capacity during a shock and a resulting defensive posture that is set in the wrong direction. It is not necessary to be sure of success in this dimension, only that the analytic product indicate how much certainty there is and what their implications are for operations of what is known and what is not.

Process

Process dimension: Did sufficient warning get produced, was warning received by officials/field commanders that would allow some action, did it have sufficient time before they could take action. Balochistan has a very peculiar and distinct security arrangement that is run by ISI/MI in collaboration with the Intelligence Bureau of the civilian police, the Counter Terrorism Department of the provincial police, intelligence wing of the Frontier Corps and even the informal feedback system of the Levies, which was abolished in 2025. Each is unique in their reporting lines, their classification culture, and their institutional interest in keeping, not sharing, sensitive source-related reporting. This kind of fragmentation is a textbook case of a failed process: that it doesn't matter if any one agency is bad, it is simply the case that no one node is on the right side of the process to fuse all of the separate agencies.

Politics

The political dimension asks, was there enough warning to decision makers, was it delivered in a timely fashion, did they accept the implications and did they approve a response commensurate? This is often the least obvious failure to occur, as there's no paper trail of a missed signal (the signal was seen and put aside). With the current context, there are three political pressures that compete for the limited intelligence and security resources of Pakistan: an Afghan border campaign against the Tehreek-e-Taliban Pakistan (TTP), the periodic crisis management with India and the reputational risk of being seen as an insecure province in the heart of the China-Pakistan Economic Corridor (CPEC). All of them offer a reason to severely underestimate or push back warnings in the specific context of Balochistan, even when the warnings are well-founded.

Tribal Integration

The fourth dimension is whether or not there is the human intelligence and community-liaison system in place, that is capable of reflecting the social and tribal fabric in which the threat resides. State activity remains limited and occasional in most of the rural areas of Balochistan where historically, the sardars, jirga and Levies have provided for the state. This is the dimension that collapses when it becomes a small clique of pro-state Baloch tribal elites who are insensitive to the interests of the young and urbanized balochs and when the architecture is deleted from the system without an alternative mechanism to replace it (e.g., the Levies were absorbed by the police in 2025 without any alternative mechanism or path being found to replace it) or when there is no alternative mechanism or path to replace it. As long as the tribal integration is in place, it can deliver the same sort of fine-grained, early, low-confidence tip-off no signals-intelligence platform can duplicate; when it's not, an entire district can be analytically opaque regardless of the state's technical collection capabilities.

Table 1. The four-dimension diagnostic framework: core questions and characteristic failure and success modes.

Dimension	Core Question	Typical Failure Mode	Typical Success Mode
Analysis	Was the raw information correctly interpreted into a clear, timely, actionable warning?	Signal lost in noise; mirror-imaging; underestimation of adversary sophistication; single-point-of-failure analytic products	Correct identification of an emerging pattern despite ambiguous or incomplete data
Process	Did the warning travel through the organization to the people who needed it, in time to act?	Institutional fragmentation between ISI, Military Intelligence, IB, CTD, and provincial police; hoarded reporting; broken hand-off between federal and provincial tiers	Fused, cross-agency reporting reaching field commanders and civilian administrators with actionable lead time
Politics	Did decision-makers accept the warning and authorize a proportionate response?	Denial or minimization for reputational reasons; reluctance to divert resources from other fronts (Afghanistan border, Kashmir); scapegoating instead of reform	Willingness to absorb bad news, reallocate resources, and accept political cost of a hard response
Tribal Integration	Did the state's human and informal intelligence networks reflect the actual social terrain of Balochistan?	Reliance on co-opted sardars with a stake in the status quo; Levies hollowed out or dissolved; alienated youth cohorts outside any state information network	Genuine local buy-in through Levies, jirgas, and development that produces voluntary tip-offs

Case Study: The Current Wave of Terrorism in Balochistan

Scale and Tempo

The proportional escalation is a rather further continuation of a developmental trend which has been running since 2019. The Pakistan Institute for Conflict and Security Studies reported in 2025 to be the worst year of the current cycle for casualties among civilians, civilian victims, security personnel and civilians and security personnel who lost their lives, respectively, with over

2,000 militants and insurgents eliminated across the country and over 600 security officials with fatalities reported and civilians (who were killed) and security officials (who were killed) in addition. Province of Balochistan claimed of several hundred armed incidents in the province took place that year and in the same year between seven hundred and ten of thousands of armed persons were killed and ten of thousands of intelligence-based operations were conducted in the province, whether the number is accurate or not is clear, an intelligence system is operating in province of Balochistan and it is of high tempo, either effective or not.

Two operations bound the escalation and are representative of the changing nature of it. In March of 2025, some members of Balochistan Liberation Army (BLA) Jeeyand kidnapped several hundred passengers from the Jaffar Express passenger train which was moving from Quetta to Peshawar. The Balochistan Liberation Army (BLA) Jeeyand faction who took hostage the passengers of Jaffar Express train in March 2025, have resorted to a more sophisticated and organized operation than what they have been doing for the past few years, which involved hit and run attacks. Then the given events followed as a bunch of targeted attacks were carried out around the country between midnight and 4 a.m. on 30 January 2026 including at the provincial capital Quetta, the port city Gwadar and multiple rural sites—these events were later dubbed by Pakistani media as "Operation Herof 2.0". This kind of coordination before an attack – how the hobbits communicated electronically to the scattered cells and how these cells formed a cluster in different areas without attracting any attention – is a characteristic of a working warning system and this is why the whole incident has been in the spotlight among the discussions on intelligence failures in Pakistan.

Actors, Targets and Tactics

There are no such things as a single group of insurgents. The Baloch Liberation Army (BLA) and its Majeed Brigade, a loose umbrella group, the Balochistan Liberation Front (BLF), and a number of other factions, all have distinct but overlapping command structures, making the targeting picture in its state more complicated, especially due to the command overlap between the two. Tactics have changed and a higher emphasis has been placed on a warning system based on an older more familiar threat, such as the use of female suicide bombers, the deliberate targeting of civilians by ethnicity, and the promise to target foreign commercial interests operating in the province, and, most recently, the emergence of a special maritime unit following an attack on a coast guard ship near Gwadar. All of them are actual capability changes or intentions changes which an analytic model, that has been calibrated to the insurgency's previous repertoire, would be less likely to predict.

Applying the Framework to the Current Wave

Mapping the case material against the four dimensions produces a more differentiated picture than the public "intelligence failure" narrative allows.

Analysis: partially adequate, structurally lagging

Short-horizon tactical analysis seems to be working: the amount of intelligence based operations and the specific, named targeting of BLA/TTP commanders throughout 2025 suggest that a short horizon tactical picture is being maintained at the local level. What looks weaker is longer-horizon capability analysis — determining that a string of tactics similar to that which occurred in one area, but spread out across the globe, is a sign of a new command and control capability instead of a bunch of stand-alone events. The multi-district attack made in January 2026 followed a very well-coordinated attack in March 2025 that demonstrated a high level of analytic community progress on individual cells, but underestimated the capability in attack coordination.

Process: the primary bottleneck

Overall evidence of failure in the process. Public reporting is about the province's intricate and complex intelligence and security landscape in the company of at least five agencies of intelligence and security—ISI, MI, IB, CTD, and the Frontier Corps—and at the same time, the Levies, which had already been broken up in the police in 2025, the very same year this case occurred. This does not mean that the ISI is accountable for the collection of raw in this context as Army leaders have reported against it, but not against any particular army unit. This is more a result of reporting and not so much intelligence as unfused and siloed reporting, as the security apparatus that is now trying to get tens of thousands of intelligence-related operations done a year should not be surprised if it manages to get thrown off by a multi-district coordinated attack.

Politics: resource competition and reputational discounting

The intelligence and security situation of this country has been fraught with a relationship with India, a prolonged, not so successful operation against the TTP in Afghanistan, security of CPEC and more recently, new investments with foreign countries in mineral sector in Balochistan. Every one of these needs the same scant senior attention as the others, as well as a finite number of tools to collect it and analyze it, and as much as the others the lack-of-stakes incentive on it: threats to Balochistan are easier to be ignored, downplayed or incorporated in the broader "law and order" rubric than to be explicitly recognized as "strategic surprise." That the 2026 attacks weren't triggered by an intelligence failure but through a political framing that isolates "returning to peace, unity, and development" is also consistent with the political framing that avoids the necessity of warning just now.

Tribal integration: the structurally weakest link

In the context of the case, one can't but overlook the fact that in October 2025, the Balochistan Levies that the state had kept low profile in culturally frontierised areas were being dissolved and quite importantly the dissolution of these low cost intelligence devices which helped the state keep a low profile in culturally frontierised areas. In some regions of the country the Sandeman era contract between the state and the sardars continues while in other regions the sardars'

authority has diminished because of the youth of the tribe and the shift toward greater urbanization and political extremism; and, in yet other regions the state has taken control of a few of the sardars' resources, through the continued impetus of its patronising agenda. Attacks took place in geographical areas where attacks have traditionally occurred, with attacks increasing during the month across the district on these areas, while attacks also occurred in the relatively quieter areas of the district.

Artificial Intelligence and Autonomous Aerial Drones: A New Layer on the Warning Problem

All four dimensions have been impacted by the conflict environment in which the four dimension framework is to be applied, which has also changed over the past few years. But Pakistani struggle is not state of affairs instead of that, the quadcopter which is commercially available, AI-powered content production and the emerging yet immature "counter-drone arms race" have joined in.

As it can now be seen, it's a new and ongoing problem in this country. There is clearly a new threat and definitely a continued threat in this country in the shape of the insurgents.

The organisation's militant activities began to rapidly accelerate up to 2025 and 2026 and at the end of 2026, the TTP and another affiliated group named Ittehad-ul-Mujahideen Pakistan had their own force of small UAS (mostly produced by China's DJI). The trajectory of the Baloch insurgency has also been analytically significant until recently when Baloch separatist groups claimed to have drones and drone aircraft till late 2025, though not necessarily to be used as weaponized platforms, but merely for reconnaissance and as propaganda. The gap appears to have started to narrow after the multi-district raid in January–February which was followed by the announcement of the BLA in February 2026 of the establishment of a Unit for Air and Drones Warfare. Also in connection with Balochistan, several militant groups have also begun to purchase anti-drone (anti-UAS) weapons to mask the surveillance drone and some of those interceptions have been attributed to Baloch loyalists. It isn't a technology gap thing for the state as a whole, but the beginning of a new era of 2-way drone arms race.

The analytical element of the framework is directly affected: A warning system which detects a certain type of insurgent operation (such as an ambush, the planting of an IED, kidnapping of a hostage) does not necessarily have a high probability of detecting a different type (such as dispersed low cost aerial surveillance leading to more precisely timed ground operations, or eventually stand-off aerial intelligence gathering and strike without needing a fighter present and allowed to penetrate an insurgent perimeter. The analytical part of the framework should be equally weighty with regard to the statements of intent at group level, as well as the observations of these statements at tactical level in source documents.

State-Side AI and Drone Countermeasures

It is not as if Pakistan has no indigenous armed unmanned platforms of its own – most notably the Burraq and the Shahpar systems – which have already been employed in previous counterterrorism missions for precision strikes; indeed, there have been explicit calls in policy circles in Pakistan for a greater use of drones and AI-assisted analysis, rather than large manned ground sweeps, in the next phase of counterterrorism strategy. Three categories of technology are relevant to strengthening the warning chain rather than merely the strike capability that tends to dominate public discussion:

- ***AI-assisted fusion and pattern recognition:*** Addressing the analysis dimension's weak point highlighted in Section 5.1, machine-learning tools that take in signals intercepts, drone ISR footage, and open-source and social-media indicators, and flag the kind of multi-district, dispersed coordination signature that human analysts working in single-agency stovepipes would be structurally less likely to see.
- ***Persistent, low-cost ISR drones for denied terrain:*** As has been mentioned above, small and medium unmanned aircraft can bring in some human-intelligence missing from the difficult terrain of rural Balochistan, where the dissolution of the Levies has left some gaps, albeit a partial one.
- ***Counter-UAS (C-UAS) systems:*** All detection, jamming and kinetic/directed-energy defeating capabilities to secure security force locations and civilian infrastructure from the emerging threat of a militant quadcopter in KP and which is now making inroads in Balochistan-reporting due to captured/downed insurgent quadcopter.

Implications for the Four-Dimension Framework

These extra tools of autonomous aerial system and AI are not a fifth dimension, but they seep into and augment the original four of a sort – throwing the game a lot more interesting. But because AI-supported analyses of the type of coordination patterns mentioned in Section 5.1 was found to be the least analytical link in the framework, AI becomes useful for analysis when the relationship between work advancement on the process dimension is not siloed. Finally, process, indicators from the drone and AI driven indicators add yet another data stream to add to ISI, MI, IB, CTD and the Frontier Corps and it only increases the challenge of fragmented data. Willing to part with lawyers and manpower to solve the C-UAS problem, this technology-driven solution may prove to be a politically convenient path, rather than a fair fight for attention with the demands of the conflict in the Afghan frontier and the eastern border. In this paper, not only have the dangers for the integration been formulated in reverse of what is sometimes assumed, that is, that continuous air surveillance is an alternative to the trust provided by the sardari-Levies system of integration in the ground level, but also the fact that four kids from one family were killed in an ambush by a US drone in North Waziristan outside the confines of Balochistan proper just a few months ago in 2025 heralds the reputational and legitimacy costs of remote, sensor-driven targeting decisions without proper ground verification in the kind of tribally organized

terrain described in this paper. Although extension of an aerial warning capability can be achieved, it cannot remedy a broken relationship; the state and the people who provide the very earliest and most reliable warning in the history of the world.

Assessment: The Fish in the River

Based on the four-D assessment, the warning chain of Balochistan is still not broken. The analytical dimension at the tactical level is a dimension which is legitimate and this is the basis of the success of many special intelligence operations: the identification and capture or killing of their target, whilst a larger special intelligence operation continues to surprise. Process, politics and tribal integration are weak links, they speak to an organizational and institutional warning system, not one simply lost or found because the analyst looked where they didn't. This has an easy consequence for institutional change, if the principal constraint is placed on the inter-agency fusion, then activities (which are further away to me from the ISI) take place in the wrong direction as the Levies' disintegration creates the gap in the human terrain.

This is to explain why the same broad intelligence community, dealing with what many consider the same underlying insurgency and is subjected to the same amount of stress at one moment accurately anticipates attacks and at another is taken aback by attacks (backed up by the first puzzle of the paper mentioned above). The results reflect to some extent the independent nature of analysis, process and tribal integration [and] a favourable reading of analysis one month (or district) could be tempered by a poor process reading, or vice versa.

Way Forward: Institutional Recommendations

The framework moves towards structural, as opposed to punitive, solutions and toward a wider understanding that intelligence reform in Balochistan is a part and parcel of governance reform.

Analysis: Create an ongoing, cross-agency long-horizon assessment cell of its own directly to track aggregate trends in insurgent coordination capacity, apart from the tactical, target-specific reporting that seems to be working reasonably well.

Process: Establish a real "fusion at the provincial level", with an authority to force information sharing between ISI, MI, IB, CTD and the Frontier Corps, not just ad hoc coordination where fused understanding is confined to the top of the chain.

Politics: Ensure that there is no linkage between the risk assessment of threats in Balochistan and CPEC and foreign investment rhetoric, and look at each issue individually based on its own merits.

Tribal integration: Trusting reliance should not be placed in a narrow, co-opted tribe, tribal integration has to be done with care and not abandonment, and building a new capacity in the community to replace the human-intelligence function lost when the Levies dissolved—a horrendous lack in many parts of the world—must happen through a local recruitment of a

professionalized community-liaison capacity to reconstruct granular reporting relationships offered by the sardari-based system.

Institutional accountability: An intelligence community's sub-components did not do equally well, so it is time to stop blaming the reflexive personnel reshuffle and to focus instead on dimension-specific after-action review, and assign accountability to the person in the chain of command who actually failed.

AI-assisted fusion: Develop a cross-agency analytic platform that integrates signals intercepts, drone ISR, and open-source indicators into one analytic model of a coordination pattern, under the control of an AI technology governed by the fusion mechanism described above, and not owned by any individual agency — so the technology will bolster the process dimension rather than create another sixth reporting silo.

A calibrated counter-UAS (CUAS) investment for the actual threat curve: Deploy counter-drone and counter-drone detection and neutralisation capabilities to Balochistan ahead of the maturing of the BLA's announced aerial arm, not in response to the growing threat of the more advanced militant quadcopter in KP.

Ground-truth discipline for aerial targeting: Before any new drone-based targeting or strike authority is given in tribal areas, require ground-based or human-source verification, to prevent the legitimacy costs of false strikes happening remotely when targeting in tribal areas, on top of already low tribal-integration scores.

None of these recommendations in isolation takes the place of addressing the underlying political grievances on the basis of which recruitment to Baloch insurgent groups takes place; they are part of the warning system, not the underlying causes of the conflict, which must also be an integral focus of policy. But technology is not a magic bullet for the institutional and political changes outlined above—AI and autonomous systems can be used to work in conjunction with a solid foundation of a warning chain, but they are not the solution to a broken institutional process, an unwelcoming political environment, or a soured relationship with the native population.

Conclusion

Failure to do well may be classified as “intelligence failure,” but it is not a medical “diagnosis. No one ever genuinely advocates “error of judgement” as a “diagnosis.” The four dimension framework, analysis, process, politics and tribal integration, suggests that Pakistan's warning system is not collapsing as it prepares for the episode of Balochistan terrorism; rather there are more than one, and distinct indicators showing that the process, allocation of political resources and the human-territory matrix of Pakistan's paramilitary forces and tribes are showing strains. The basic diagnosis remains unchanged in the face of increasing spread of AI technology and the new use of drones for autonomous aerial operations, both among insurgents as well as among states; it is merely heightened and complicated by the emergence of useful tools to fill the analytical vacuum the current paper has unveiled, and by the risks that autonomous aerial

fighting poses to the shortcomings of the process, politics and integration into tribes the current paper has identified. For every attempt to be useful at reform, it is a prerequisite to be able to recognize both separately and then the difference between how a new technology can increase and decrease the number of failure modes. Provided, with that same public-versus-institutional progressive discussion as foundation, the specific connections tying up the disconnection in a particular episode will fade out of mind – a progression of institutional led violence, public scapegoating – disconnection – the individuals involved get re-organized out of our view – and repeat.

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