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THE HINDU
INDIA'S NATIONAL NEWSPAPER SINCE 1878

Daily News Analysis

The Hindu Important News Articles & Editorial For UPSC CSE

Wednesday, 21 Jan, 2026

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India's deepening engagement with the Gulf region has entered a sensitive phase with the announcement of negotiations for an India–UAE Strategic Defence Partnership during the brief visit of Sheikh Mohamed bin Zayed Al Nahyan to New Delhi. While economic cooperation remains the visible anchor of India–UAE relations, the proposed defence framework has wider geopolitical implications in an already volatile West Asian security environment. The development therefore requires careful strategic assessment rather than celebratory optimism.

Bridging the Gulf

India must tread cautiously as it negotiates defence ties with Gulf nations

The nearly two-hour visit of UAE President and Ruler of Abu Dhabi Sheikh Mohamed bin Zayed Al Nahyan (MbZ) to Delhi on Monday, with only one meeting with Prime Minister Narendra Modi, ended with a number of far-reaching outcomes. The UAE is India's third-largest trading partner, its second biggest export destination, seventh biggest foreign investor, and concluded its first bilateral trade agreement with India in 2022. The agreements on Monday focused on the economic partnership – a commitment to double bilateral trade to $200 billion, an LNG deal for $3 billion and UAE investment in Gujarat. However, the major announcement was the intention to conclude a framework agreement for an India-UAE "Strategic Defence partnership", the first of its kind. Details are still to be revealed. However, it is clear that West Asia and South Asia will be watching closely given the complicated security environment in both regions. MbZ's sudden India visit came amidst heightened tensions between the UAE and the Kingdom of Saudi Arabia. Both countries were once a part of the same military coalition against the Houthi uprising in 2014. Their power tussle has also intensified over forces in Sudan, and the lack of communication between MbZ and Saudi leader Mohammed Bin Salman (MbS) is now being called the Gulf region's new "cold war". In addition, protests in Iran and the U.S.'s threats to intervene as well as the tenuous Gaza ceasefire and U.S. President Donald Trump's plans for a Board of Peace have led to concerns about internal and external instability. Israel's bombing in Qatar in September 2025, that led the Saudi government to rush a "mutual defence pact" with Pakistan, and reported negotiations of including Türkiye in the pact, portend a more complex and unstable region, with repercussions for India.

The announcement of the UAE-India negotiations for a defence agreement is being read by some as a possible military front to counter other regional alignments. Foreign Secretary Vikram Misri attempted to downplay concerns, holding that the treaty was not about India's involvement in "a hypothetical future scenario in the region". Even so, the government must keep in mind ties not only with the UAE but also other important Gulf region countries, where nearly 10 million Indians reside. The GCC-area is a major energy source, especially as U.S. and EU sanctions have curtailed all of India's other important sources. India's cross-regional connectivity plans through Iran's Chabahar port, the International North South Transport Corridor and the India-Middle East-Europe Economic Corridor have been imperilled due to all the tensions as their future depends on cooperation with all players there. With important relationships in the region, and so many faultlines within it, India has little option but to tread lightly.

Background and Context

The United Arab Emirates is among India's most significant partners: a major trading counterpart, investor, and energy supplier, with the Comprehensive Economic Partnership Agreement (CEPA) concluded in 2022. The recent announcements — doubling bilateral trade to $200 billion, LNG supply agreements, and investments in Gujarat — reinforce economic interdependence.

However, the proposed defence partnership is qualitatively different. It comes amid growing fissures within the Gulf, particularly the strategic rivalry between the UAE and Saudi Arabia, led respectively by MbZ and Mohammed bin Salman. Regional instability has further intensified due to tensions involving Iran, the fragile Gaza ceasefire, and shifting U.S. strategic priorities under Donald Trump.

Strategic and Security Implications for India

Complex Gulf Power Politics: The emerging "cold war" within the Gulf Cooperation Council (GCC) creates a risk that any defence alignment may be perceived as taking sides. India has traditionally benefited from maintaining strategic autonomy and balanced relations across rival blocs in West Asia.

Diaspora and Energy Security Concerns: Nearly 10 million Indians live and work in the Gulf, making regional stability a core national interest. Additionally, the Gulf remains a critical energy source for India, particularly as sanctions have constrained supplies from other regions.

Impact on Connectivity Projects: India's cross-regional connectivity initiatives — including Chabahar Port via Iran, the International North South Transport Corridor (INSTC), and the India–Middle East–Europe Economic Corridor (IMEC) — depend on cooperation among competing regional actors. Heightened militarisation or bloc politics could undermine these long-term strategic projects.

Balancing Defence Cooperation and Non-Alignment: Statements by Vikram Misri attempting to downplay the military implications underline New Delhi's awareness of these risks. Defence cooperation must remain capacity-building and non-provocative, rather than alliance-like or directed against third parties.

Conclusion

India's engagement with the UAE reflects its broader aspiration to be a credible, stabilising power in West Asia. However, the region's multiple fault lines — intra-Gulf rivalries, great power competition, and ongoing conflicts — leave little room for strategic miscalculation.

While economic and technological cooperation with the UAE should be deepened, defence ties must be calibrated with caution, transparency, and strategic restraint.

For India, preserving balanced relationships across the Gulf, protecting its diaspora and energy interests, and safeguarding regional connectivity projects remains far more important than entering any perception of military bloc politics.

UPSC Mains Exam Practice Question

Ques: In the context of rising intra-Gulf rivalries and growing regional instability in West Asia, examine the strategic implications of the proposed India–UAE Strategic Defence Partnership. Why must India tread cautiously while deepening defence cooperation with Gulf countries? (150 Words)

Page 08 : GS III : Economy & Environment

The rapid global transition towards electric vehicles (EVs) is central to climate mitigation strategies and the decarbonisation of transport systems. However, beneath this technological optimism lies a critical structural challenge — the growing mismatch between surging copper demand and constrained global supply.

As highlighted in the article, copper has emerged as a strategic mineral essential for EV batteries, motors, charging infrastructure, and power grids. The accelerating EV adoption, therefore, is not merely an industrial shift but a resource-intensive transformation with deep economic and geopolitical implications.

The EV boom is accelerating a copper crunch

The global shift toward electric vehicles (EVs) is widely celebrated as a technological breakthrough and a vital step toward a greener future. However, there also lies a growing and underappreciated challenge: an impending copper crunch. Copper is indispensable for electrification and forms the backbone of EV batteries, motors, wiring, charging infrastructure, and power grids. As EV adoption accelerates, copper demand has entered a phase of exponential growth that many policymakers and markets have underestimated. Over the past decade, EVs have moved from a niche product to the fastest-growing segment of the global automotive industry, with profound consequences for the global commodity systems.

Between 2015 and 2025, global EV sales rose from approximately 0.55 million units to an estimated 20 million units, while associated copper consumption surged from roughly 27.5 thousand tonnes to over 1.28 million tons, showing copper to be the hidden backbone of the EV revolution. However, supply growth has lagged due to decades of underinvestment, declining ore grades, and the 10-15 year development cycle for new mines. Consequently, a structural supply deficit could emerge as early as 2026, reshaping global trade, intensifying geopolitical competition and influencing the cost and the pace of EV adoption. Therefore, the EV transition must be understood not only as a technological shift but also as a resource-intensive transformation constrained by metals as much as by markets.

In near perfect lockstep

One of the most striking features of the electric vehicle (EV) transition is the near one-to-one relationship between EV sales growth and copper demand, as reflected in elasticity estimates.

Between 2016 and 2024, the copper demand elasticity with respect to EV sales mostly exceeded 1.0, indicating that copper consumption increased faster than EV adoption despite sustained efforts to reduce metal intensity. During this period, EV-related copper demand surged from approximately 39,000 tonnes in 2016 to over 1.1 million tonnes in 2024, while global EV sales expanded from approximately 0.75 million units to around 17 million units. The linkage was especially pronounced in 2019, when elasticity peaked at 1.76, signalling a sharp rise in copper use per vehicle – driven by larger battery packs, increased power electronics and rapid charging infrastructure expansion. Although elasticity is projected to ease to approximately 0.90 by 2025, as efficiency gains emerge, the absolute copper demand will continue to rise owing to the scale of EV deployment. With EVs requiring four to five times more copper than internal combustion vehicles and no viable large-scale substitutes available, this synchrony underscores the persistent structural demand pressure. Ultimately, this copper-intensive trajectory, more than battery technology alone, will shape the pace of global electrification.

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With demand threatening to outpace supply, there need to be bold actions in recycling and technological innovation

A global copper deficit phase

While copper demand is rising sharply, global supply has begun to plateau, creating a widening gap often described as a "jaw-opening deficit". Declining ore grades at existing mines, decade-long development timelines for new projects, and environmental opposition in major producing regions such as Chile, Peru and the United States constrain supply growth. In 2024, global supply is expected to exceed demand by approximately 0.3 million tonnes, but by 2026, demand is projected to reach 30 million tonnes, while supply lags at around 28 million tonnes.

This gap is expected to widen to 4.5 million tons by 2028 and nearly 8 million tons by 2030, equivalent to the output of the world's 10 largest copper mines combined. Such shortages could increase EV costs, delay the development of charging infrastructure, and strain decarbonisation targets. As electrification accelerates, copper scarcity may become the main bottleneck unless mining, recycling and material innovation are rapidly scaled up.

A reshaping of global market dynamics

The geography of EV-driven copper consumption signals a major shift in the global power balance, with China emerging as the dominant force in electric vehicle adoption and copper usage. China's EV-related copper demand surged from about 78,000 tonnes in 2020 to nearly 6,78,000 tonnes in 2024 and is projected to reach around 7,80,000 tonnes by 2025, accounting for almost 60% of global EV-based copper consumption. This dominance is driven not only by strong EV sales but also by China's control of over 70% of global battery cell production and its deeply integrated supply chain.

By 2025, EV-related copper demand is expected to reach approximately 210,000 tonnes in the European Union and 1,14,000 tonnes in the U.S., while India remains modest at roughly 7,200 tonnes. This asymmetry provides China with a structural advantage in terms of pricing power, long-term supply contracts, and strategic leverage over copper-rich regions. As copper becomes central to energy transition, securing access will rival battery technology as a global priority.

The EV revolution is not only reshaping transportation but also the global metals economy. Copper has emerged as a vital artery of electrification, and the world is rapidly approaching a moment when demand outpaces supply in ways that are unprecedented in modern industrial history. Policymakers, investors and environmental planners must recognise that the energy transition is inseparable from resource strategy. Without bold actions on copper supply, recycling, and technological innovation, the pace of electrification will be dictated by geology rather than ambition.

Core Issue: EV–Copper Nexus

EVs require nearly four to five times more copper than internal combustion engine vehicles, making copper demand closely correlated with EV sales growth. The near one-to-one elasticity between EV expansion and copper consumption underscores copper's irreplaceable role in electrification. Despite incremental efficiency gains, the absolute demand continues to rise due to scale effects, signalling persistent structural pressure on copper markets.

On the supply side, copper mining faces long gestation periods (10–15 years), declining ore grades, environmental opposition, and chronic underinvestment. Major producing regions such as Chile, Peru, and the United States are

witnessing regulatory and ecological constraints, limiting rapid capacity expansion. Consequently, a global copper deficit is projected from 2026 onwards, potentially widening sharply by 2030.

Geopolitical and Economic Dimensions

The copper crunch is also reshaping global power equations. China dominates EV manufacturing, battery production, and downstream copper consumption, accounting for nearly 60% of EV-related copper demand. This provides China with strategic leverage through long-term supply contracts and influence over copper-rich regions. In contrast, the European Union and the United States lag behind, while India's current copper demand from EVs remains marginal, though likely to rise with policy push towards e-mobility.

Copper scarcity could inflate EV costs, slow charging infrastructure rollout, and jeopardise decarbonisation targets, thereby linking climate ambitions directly to mineral security.

Way Forward

Addressing the copper crunch requires a multi-pronged strategy: accelerated mining approvals with environmental safeguards, large-scale recycling and urban mining, diversification of supply chains, and sustained R&D into material substitution and efficiency improvements. For countries like India, early planning in critical mineral strategy is essential to avoid future vulnerabilities.

Conclusion

The EV revolution, while essential for a low-carbon future, is fundamentally constrained by material realities. Copper has become the silent backbone of electrification, and its looming scarcity could dictate the speed and equity of the global energy transition. Unless policymakers integrate resource strategy with climate ambition, the transition risks being shaped more by geological limits than technological intent.

UPSC Mains Exam Practice Question

Ques : Discuss how the growing demand–supply mismatch in copper can impact India's electric vehicle ambitions and broader decarbonisation goals. **(150 Words)**

Page 09 : GS II : International Relations

India's reported move to scrap curbs on Chinese firms bidding for government contracts marks a potential recalibration of its economic engagement with China. These restrictions, imposed in 2020 after the Galwan Valley clash, were rooted in national security concerns but have had significant economic consequences.

As global supply chains realign amid geopolitical tensions, India faces a strategic dilemma: can it integrate into China-plus-one supply chains and compete with China without selectively engaging Chinese capital and firms?

To compete with China, India may need China

With India set to scrap curbs on Chinese FDI, will China want to invest in India?

DATA POINT

Nitika Francis

The Ministry of Finance is set to scrap curbs on Chinese firms bidding for government contracts, which were introduced in 2020. The curbs were imposed following a deadly clash between the countries' troops in the Galwan Valley. They required Chinese bidders to register with an Indian government committee and obtain political and security clearances. According to Reuters, this resulted in China losing out on contracts worth $700-750 billion.

Notably, even during periods when India had a more favourable stance, direct Chinese investment remained low. China directly contributed less than 1% of India FDI equity inflows from 2000 to 2021 **(Chart 1)**, showing that recent curbs only add pressure.

However, China's cumulative (direct and indirect) FDI inflows before 2020 into India are difficult to calculate as they were mostly routed through tax havens, according to Santosh Pai, Partner at Denton's Link Legal and Honorary Fellow, Institute of Chinese Studies. "Chinese investments almost never go directly into a country," he told *The Hindu*.

These means of investments were wholly altered when the Indian government issued 'Press Note 3' in April 2020, which specifically stated that an entity of a country, which shares a land border with India, or where the beneficial owner is a citizen of any such country, requires mandatory approval from the Government of India before for an investment can be executed. Pai estimated that this dented any indirect investments that Chinese companies had slated for India.

A few years after this policy amendment, India's Ministry of Finance, in its annual Economic Survey for 2023-24, suggested that increased FDI inflows from China can help increase India's global supply chain participation and push exports. The Ministry took note of the U.S.' and Europe's shift away from sourcing imports directly from China. The U.S.' total trade with China reduced in 2023 and remained stagnant in 2024 **(Chart 2A)**. The European Union also saw a similar dip in trade with China in 2023 **(Chart 2B)**.

The Survey stated that FDI from China could boost India's exports to the U.S., "similar to how East Asian economies did in the past." Pai elaborated on India's change of heart. "Due to China's dominance in most markets, India cannot attract global supply chains which want to diversify from China without including Chinese companies in the mix," he said.

India has proven to be a ready alternative for the U.S. to replace China in at least one of the major items. Due to its dominance in the manufacturing of components, China made up more than 60% of the U.S.'s imports of smartphones in 2016. However, 10 years later, China's share has dwindled to about 22% of the U.S.'s smartphone imports, majorly due to higher tariffs **(Chart 3A)**. Meanwhile, countries such as Vietnam, Thailand, and India have shown upticks in their shares of U.S.'s smartphone imports **(Chart 3B)**. However, the possibility of replicating this success, without China's help, in other items as well is slim as of now.

While China's FDI stock (or cumulative FDI inflows) to most of its staple investment destinations have increased over the years, its stock with India has declined over the past decade. **Table 4** shows that when Chinese FDI stock is ranked, India fell by 19 ranks between 2014 and 2024.

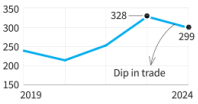
Pai stated that although China was eager to invest in Indian companies, the curbs that were set in 2020 may have projected an unpredictable environment for investment.

Pragmatism over protectionism

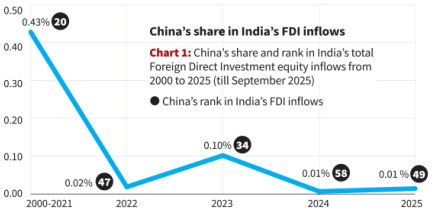
The data were sourced from DPIIT, UN Comtrade, Eurostat, U.S. Census and China's Ministry of Commerce

Chart 2A: The U.S.'s total trade (sum of imports and exports) with China over the years (in $. bn = billion)

Chart 2B: The European Union's total trade (sum of imports and exports) with China over the years (in $)

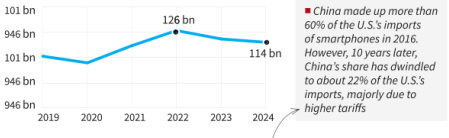


The figures in chart 2B for the EU's trade were sourced from Eurostat data wherein exports and imports are indexed at 100 each, with 2013 as the starting year. Using this method, EU's total trade in 2013, which includes imports and exports, is represented as 200. In 2019 the index had increased to 239



The figure for the years between 2000 and 2021 is cumulative

Chart 3A: The U.S.'s overall smartphone imports over the years. Values in $ (bn = billion)



China made up more than 60% of the U.S.'s imports of smartphones in 2016. However, 10 years later, China's share has dwindled to about 22% of the U.S.'s imports, majorly due to higher tariffs

Chart 3B: Select countries' share in the U.S.'s import of smartphones over the years. Here, data on "smartphones" refers to the import of "Telephones for cellular networks or for other wireless networks"

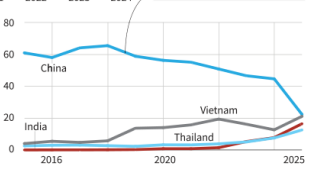


Table 4
China's country-wise Outward Direct Investment (ODI) stock in 2014 and 2024. The countries are ranked in descending order of China's ODI stock with them. Stock corresponds to cumulative FDI flows over the years

2014 rank	Country	Stock at end-2014 ($ million)	2024 rank	Country	Stock at end-2024 ($ million)
1	Hong Kong	509,919.83	1	Hong Kong	1,920,809.36
2	British Virgin Islands	49,320.41	2	British Virgin Is.	331,910.47
3	Cayman Islands	44,236.72	3	Cayman Islands	214,933.81
4	United States	38,010.97	4	Singapore	102,641.42
5	Australia	23,882.26	5	United States	89,959.17
6	Singapore	20,639.95	6	Netherlands	38,422.28
7	Luxembourg	15,666.77	7	Australia	34,011.22
8	United Kingdom	12,804.65	8	United Kingdom	30,575.22
9	Russia	8,694.63	9	Indonesia	25,482.34
10	Canada	7,789.08	10	Luxembourg	25,153.62
..15	India	3,407.21	...34	India	2,449.77

Background and Policy Context

Following the 2020 border clash in the Galwan Valley, India tightened scrutiny over investments from neighbouring countries through Press Note 3, mandating government approval for FDI where the beneficial owner is from a land-bordering country.

This effectively curtailed both direct and indirect Chinese investments, many of which earlier flowed through tax havens. While these measures addressed security sensitivities, they also contributed to China losing out on large infrastructure and government contracts in India.

Importantly, even before 2020, China accounted for less than 1% of India's direct FDI equity inflows, indicating that regulatory curbs compounded an already modest investment relationship rather than reversing a large flow.

Economic Rationale for Reconsideration

India's Economic Survey 2023–24 signals a pragmatic shift, arguing that Chinese FDI could help India integrate into global value chains (GVCs) and boost exports, particularly to the United States and the European Union, both of which are gradually reducing direct trade dependence on China.

Historically, East Asian economies leveraged Chinese capital and intermediate inputs to expand export competitiveness — a model India may need to emulate selectively.

The smartphone sector illustrates this dynamic. While China's share in U.S. smartphone imports has declined sharply due to tariffs and geopolitical frictions, countries like India, Vietnam, and Thailand have gained ground.

However, scaling this success across sectors such as electronics, machinery, and green technologies is difficult without participation from Chinese firms that dominate component manufacturing and upstream supply chains.

Strategic and Geopolitical Implications

China's declining FDI stock rank in India over the past decade reflects not only policy barriers but also investor perceptions of regulatory unpredictability.

At the same time, India's ambition to position itself as a global manufacturing hub under initiatives like Make in India and supply chain diversification efforts cannot be fully realised in isolation from China's industrial ecosystem.

The challenge, therefore, lies in balancing economic pragmatism with strategic autonomy. Allowing calibrated Chinese investment — particularly in non-sensitive sectors, joint ventures, and export-oriented manufacturing — could enhance India's competitiveness while retaining safeguards for national security.

Conclusion

India's reconsideration of curbs on Chinese investment reflects a hard economic reality: competing with China in global markets may require limited cooperation with Chinese capital and firms.

The path forward is neither complete openness nor rigid exclusion, but a calibrated, sector-specific engagement framework. If managed prudently, such an approach can strengthen India's role in global supply chains without compromising core strategic interests.

UPSC Mains Exam Practice Question

Ques: Economic pragmatism often coexists uneasily with strategic mistrust. In the context of India–China relations, critically examine India's decision to reconsider curbs on Chinese FDI despite unresolved border and security concerns. **(150 words)**

Page 10 : GS II & GS III : IR & Sci and Tech / Prelims Exam

The emergence of **Pax Silica** marks a significant shift in the geopolitics of technology, resources, and supply chains. As semiconductors, Artificial Intelligence (AI), and rare earth elements (REEs) become central to economic growth and national power, countries are increasingly viewing technology supply chains through a strategic and security lens.

Convened by the United States in December 2025, Pax Silica aims to reduce coercive dependencies, secure critical tech and AI supply chains, and build trusted digital infrastructure. For India, aspiring to be a major player in the digital and manufacturing economy, potential membership carries both strategic opportunities and complex challenges.

The importance of Pax Silica for India

The Pax Silica initiative seeks to reduce coercive dependencies, secure global tech/AI supply chains, and build trusted digital infrastructure.
India seeks to join it as it has a strong digital infrastructure, and a growing AI market

WORLD INSIGHT

Sanjay Pulipaka

Both enduring continuities and significant shifts define the functioning of the global economy. While the North-South divide in per capita income and resource utilisation remains an enduring feature, new technologies such as semiconductors and Artificial Intelligence (AI) are gaining greater salience in powering the global economy. These technologies will have a significant impact on the everyday lives of many people around the world. Consequently, there is now a growing urgency to secure the supply of Rare Earth Elements (REEs) and to nurture manufacturing processes associated with these technologies.

On December 12, 2025, the U.S. convened the inaugural Pax Silica Summit to secure the supply chain of critical minerals and build advanced manufacturing and logistics capabilities critical to new frontier technologies such as semiconductors and AI. 'Pax' in Latin means 'peace' and 'Silica' is a key compound used in chip manufacturing – taken together they suggest that the supply chain for new technologies should promote peace and prosperity. The Pax Silica Declaration noted that the initiative seeks to reduce coercive dependencies, secure global tech/AI supply chains, and build trusted digital infrastructure.

Major participants

The membership of the Pax Silica is evolving. While the U.S. and Japan are technological powerhouses, Australia is the leading exporter of Lithium (a key component in rechargeable batteries and digital products) and has significant REE deposits. The Netherlands has leading firms such as ASML, which develop advanced lithography technology that enables semiconductor chip engineering, while South Korea is well-known for its manufacturing prowess in memory chips. Singapore also has a long history of chip manufacturing in collaboration with leading U.S. firms. Israel has made significant strides in AI software, defence-related technologies and cybersecurity. Moreover, the United Kingdom has the third-largest AI market and a robust innovation ecosystem, which includes established research labs and start-ups. Qatar and the United Arab Emirates command large investment funds and have initiated measures to develop world-class AI ecosystems.

Canada, the European Union, the Organisation for Economic Co-operation and Development (OECD), and Taiwan participated in the inaugural Pax Silica Summit as observers, and they may be admitted as members at a later date.

Countering China

Pax Silica is a response to new geopolitical realities. There are concerns that China has emerged as a principal supplier of REEs and acquired the capability to shape the global flow of these resources. In recent years, China has restricted the flow of critical resources to achieve its desired political and economic ends. Last year, in response to U.S. President Donald Trump's tariff policies, China suspended the export of REEs to the U.S. and other countries. India also experienced disruptions to the import of rare-earth magnets from China, negatively impacting the country's automobile and electronics industries. The supply of rare-earth magnets to India was restored only after Indian companies complied with China's stringent licensing regulations, which included providing an undertaking that imported rare-earth magnets would not be used for defence or dual-use purposes.

Global demand: A view of a rare earth processing plant in Dingnan County, Ganzhou, in eastern China's Jiangxi province, on November 20, 2025. AFP

Even before the recent challenges in accessing REEs, the pandemic demonstrated the limitations of supply chains that are heavily reliant on a single country. In 2021, India, along with Australia and Japan, launched the Supply Chain Resilience Initiative. India was also working with the Quad countries to strengthen the supply chain resilience of critical and emerging technologies. The Quad Critical Minerals Initiative was launched at the foreign ministers' meeting in Washington in 2025. Interestingly, despite being a member of the above-mentioned initiatives, India was not invited to the inaugural meeting of Pax Silica. However, on January 12, the new U.S. Ambassador to India, Sergio Gor, in his arrival speech, stated that India will soon be invited to join the Pax Silica.

India's challenges

What would India bring to the table in the Pax Silica? Indian and American firms have a history of healthy collaboration in the technology domain. India has a strong digital infrastructure, and its AI market is growing rapidly, with many enterprises adopting AI solutions. It is also true that India's AI and semiconductor ecosystems are well behind those of Pax Silica countries. However, it should be noted that India has launched AI and Semiconductor Missions with substantial financial allocations in recent years. While Indian private companies such as the Tatas have invested in the semiconductor segment, leading U.S. chip manufacturers such as Micron have also invested in India. There has also been a steady increase in the number of newly funded AI companies in India. Furthermore, India is sending a large number of educated young people to pursue graduate and PhD programmes in computer science and related fields in the U.S. If the current U.S. visa policies persist, many of these engineers will have to return to their home country, providing India with a large, highly trained human resource pool to power AI and semiconductor industries.

Moreover, India has been working to develop resilient semiconductor supply chains with other Pax Silica countries such as Japan and Singapore. Indian private-sector companies are also collaborating with Israeli firms to establish semiconductor fabrication plants in India. By participating in the Pax Silica, India can scale-up its collaborations with other countries to develop robust semiconductor and AI ecosystems in the country.

However, India will need to be mindful of a few challenges that it needs to navigate carefully. Thus far, the member countries of the Pax Silica, in addition to their technological strengths, are U.S. allies and high-income countries. If India decides to join the Pax Silica, it will be the first developing country to do so. India will also be the first non-ally (but a strategic partner) of the U.S. to join the Pax Silica. This may create an 'expectation gap' between India and the other members of Pax Silica. While India's response to global security threats may not undermine the interests of the U.S. and its allies, it will differ in nuance. India will be keen to ensure that its strategic autonomy is not diluted through its participation in the Pax Silica.

As a developing country, India has relatively young semiconductor and AI ecosystems compared with those of other Pax Silica countries. Consequently, India will seek to protect its semiconductor and AI ecosystems by granting domestic firms preferential treatment through subsidies, government procurement, and calibrated import regulations. While the current mood in Washington may not be in agreement with such policy measures, it remains unclear how other Pax Silica countries will respond to such initiatives.

The road ahead

At the moment, China is a leading player in the REE supply chain and has already instituted export control regulations to preserve its dominant position.

Beijing has also not demonstrated a willingness to create REE supply chains that are sensitive to the development needs of emerging economies such as India. It is likely that the Pax Silica will come up with its own export regulation framework. Over time, two REE supply chains will dominate the global economy, namely that of China's and Pax Silica's. Given the history of collaboration between Indian and Western firms in information technology and related domains, India may lean towards the Pax Silica.

However, given the current strain in economic relations with the U.S., India may seek to have more conversations to better understand the possible trajectory of Pax Silica's evolution.

Sanjay Pulipaka is the Chairperson of the Politeia Research Foundation. The views expressed here are personal.

THE GIST

On December 12, 2025, the United States (U.S.) convened the inaugural Pax Silica Summit to secure the supply chain of critical minerals and build advanced manufacturing and logistics capabilities critical to new frontier technologies such as semiconductors and AI.

Pax Silica is a response to new geopolitical realities. There are concerns that China has emerged as a principal supplier of REEs and acquired the capability to shape the global flow of these resources.

As a developing country, India has relatively young semiconductor and AI ecosystems compared with those of other Pax Silica countries.

What is Pax Silica and Why It Matters

The Pax Silica initiative symbolically combines "peace" (Pax) with "silica", the foundational material for semiconductors, underscoring the idea that resilient and diversified technology supply chains are essential for global stability.

- Its members include advanced technology economies and resource-rich countries such as Japan, Australia, Netherlands, South Korea, Singapore, Israel, the United Kingdom, Qatar and the United Arab Emirates. Together, they span the full value chain — from critical minerals and capital to chip design, manufacturing, and AI ecosystems.
- The initiative is also a strategic response to China's dominance over REEs and critical technology inputs. China's use of export controls on rare earths, including disruptions faced by India's automobile and electronics sectors, has highlighted the vulnerability of over-concentrated supply chains.

India's Strategic Relevance

India's interest in Pax Silica stems from both opportunity and necessity. While India lags behind advanced economies in semiconductor fabrication and frontier AI research, it possesses several comparative advantages:

A strong and scalable digital public infrastructure.

A rapidly expanding AI market with increasing enterprise adoption.

Large human capital potential, reinforced by Indian students trained in advanced technology fields abroad.

Ongoing initiatives such as the Semiconductor Mission and AI Mission, backed by public funding and private investment.

India has already collaborated with Pax Silica countries through mechanisms like the Supply Chain Resilience Initiative (with Japan and Australia) and the Quad Critical Minerals Initiative. Participation in Pax Silica could help India integrate more deeply into trusted global value chains, attract high-quality investment, and reduce dependence on China for critical inputs.

Key Challenges for India

India's potential entry into Pax Silica is not without friction. It would be:

The first developing country in a grouping dominated by high-income U.S. allies.

The first non-allied strategic partner of the U.S. in such a framework.

This raises concerns of an "expectation gap". India's insistence on strategic autonomy, its nuanced approach to global security issues, and its need to protect infant semiconductor and AI industries through subsidies and procurement preferences may not always align with the policy preferences of advanced economies. Managing these divergences will be critical to ensuring that participation strengthens, rather than constrains, India's policy space.

Implications for Global Order

- Over time, the world may witness the emergence of two parallel technology and REE supply chains — one centred on China and the other on Pax Silica.
- Given China's limited sensitivity to the developmental needs of emerging economies, India may find Pax Silica a more compatible long-term partner, provided its concerns on autonomy and domestic capacity-building are accommodated.

Conclusion

Pax Silica represents a new phase in the intersection of geopolitics, technology, and economic security. For India, potential membership offers an avenue to secure critical supply chains, accelerate its semiconductor and AI ambitions, and reduce strategic vulnerabilities arising from excessive dependence on China.

However, success will depend on India's ability to balance deeper technological cooperation with the preservation of strategic autonomy and developmental priorities. If navigated prudently, Pax Silica could become a key pillar in India's quest to emerge as a major technology power in the 21st century.

UPSC Prelims Exam Practice Question

Ques: Pax Silica is most closely related to which of the following strategic concerns?

(a) Nuclear non-proliferation

(b) Maritime security in the Indo-Pacific

(c) Rare earth elements and semiconductor supply chains

(d) Climate change finance

Ans: c)

UPSC Mains Exam Practice Question

Ques: Pax Silica represents a new form of technology-driven geopolitics. Discuss its objectives and evaluate the strategic implications of India's possible membership. (**150 Words)**

Page 11 : GS III : Sci and Tech / Prelims Exam

After decades of state-led space programmes, the global space sector is undergoing a structural transformation driven by private enterprises and reusable launch technologies. With the commercial space economy projected to exceed $1 trillion by 2030, innovations pioneered by companies such as SpaceX have fundamentally altered the cost, cadence, and sustainability of access to space. Reusability has emerged as the core technological driver of this shift, moving the industry from a "disposable launch" paradigm to a "space transportation" model.

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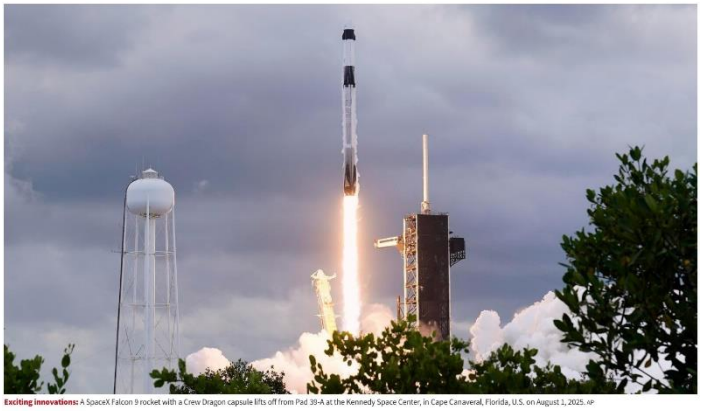

Exciting innovations: A SpaceX Falcon 9 rocket with a Crew Dragon capsule lifts off from Pad 39-A at the Kennedy Space Center, in Cape Canaveral, Florida, U.S. on August 1, 2025. AP

How reusability can lead to sustainable, cost-effective access to space

The commercial space industry is evolving rapidly, driven by reusable rocket technologies that significantly lower launch costs. Companies like SpaceX lead the charge, with the market projected to exceed $1 trillion by 2030, enhancing sustainability and increasing mission frequencies

Unnikrishnan Nair S.

After four decades of government-led space exploration, the new millennium has ushered in a commercial revolution where private companies now lead and fund the industry's most significant breakthroughs. Space is now a fast-growing industry, expected to exceed $1 trillion in value by 2030. The application of innovative technologies, notably partial reusability of rockets by these new players, has reduced the cost of access per kg to space by a factor of 5-20 compared to expendable rockets and increased the launch cadence considerably.

How efficiently can rockets launch payloads or crew?

Human space missions are 3-5-times more expensive than satellite missions because of the more complex requirements for life support, safety, redundancy, and mission planning. These systems require higher investment in technology and infrastructure compared to uncrewed satellite missions. In contrast, most satellite missions are one-way trips built with comparatively simpler hardware/software architectures.

Rockets have to face two major hurdles on their way to orbit through the atmosphere: gravity and aerodynamic drag. To move forward, the rocket has nothing to push against; hence, it must eject engine exhaust backward in a supersonic jet.

The Tsiolkovsky rocket equation connects how fast a rocket can go to the amount of fuel it burns and how much it weighs. It shows that space travel has a weight problem: because fuel is so heavy, the rocket needs more fuel just to lift the first load of fuel. This creates a cycle where over 90% of a rocket's mass is dedicated to propellant and tankages, leaving less than 4% for the actual satellite.

Why do rockets have stages?

Staging splits a rocket into independent propulsion units that are discarded sequentially to shed dead weight. It's an engineering trick used to beat the 'trap' of the Tsiolkovsky equation by discarding spent stages in-flight so that the propellant-to-mass fraction of the remaining vehicle improves. In traditional expendable rockets, including PSLV and LVM-3, each stage is used once and thrown away, usually falling into the ocean.

The private company SpaceX brought in many path-breaking technologies, including 3D printing rocket parts, modular design, making most parts in-house (called vertical integration), and reusing rocket stages. Together they have cut costs sharply and increased launch frequency.

Reusability is widely considered the single most significant game-changer for human access to space, fundamentally shifting the industry from a 'disposable' model to a 'transportation' model. The SpaceX Falcon 9 rocket's first stage comes back to the earth using a mix of smart engineering and automation. Here, the stage fires its engines to slow down as it nears the ground, removing most of its kinetic energy. The remainder is dissipated by the aerodynamic drag during its journey through the air.

SpaceX has successfully recovered the first stages of its Falcon 9 rockets more than 520 times. It's currently developing its next generation multi-purpose rocket, Starship, as a fully reusable vehicle with a more efficient architecture. It has enough power to carry crew and cargo to the earth's orbit, the moon, and even Mars.

Worldwide there are more than a dozen private companies and start-ups actively developing reusable rocket technology. At least three of them are working on the more challenging fully-reusable rocket technology. Washington-based Blue Origin has successfully demonstrated recovery of the booster for its New Glenn vehicle via vertical landing. The commercial space sector in China is also rapidly advancing, with companies like LandSpace recently attempting to recover parts of its orbital-class Zhuque 3 rocket.

Can a stage be reused multiple times?

The number of times a recovered rocket stage can be used is limited primarily by structural and material fatigue, especially in the main engines and fuel tanks.

The extreme temperature swings from cryogenic propellants to combustion heat, combined with immense pressure and g-force cycling during ascent and re-entry, cause fatigue and microfractures. The practical limit is also set by refurbishment economics and acceptable risk. As the number of flights increase, the cost and time required for rigorous inspection, testing, and replacement of vulnerable components, to maintain high reliability, will eventually outweigh the cost savings compared to building a new stage. SpaceX has been known to reuse the first stage more than 30 times for launch missions.

Where does India stand?

The Indian Space Research Organisation (ISRO) has been working on different models of recovery technologies. One option is the Reusable Launch Vehicle (RLV), a winged spacecraft, like a mini shuttle, that can be launched to space on a rocket and then made to re-enter to land on a runway. The other option is recovering the spent first stage of a rocket with a combination of aerodynamic drag and retro-propulsion to land on a barge or land. Technology development activities are progressing in these domains.

In order to be competitive in a rapidly emerging space market where fully reusable launch vehicles are about to be a usual feature, the need of the hour is inducting disruptive technologies that will lower the cost of accessing space. Therefore, future launch vehicles should target configurations with a minimum number of stages with partial or full recovery and with reuse of stages as a non-negotiable design driver.

Today, advances in propellant density and engine efficiency allow two-stage systems to perform missions that previously required three or more stages. A careful balancing of the energy delivered by each stage, its cost share, innovative technologies for high performance, compact engine development, recovery of stages, and refurbishment for increasing launch cadence are some of the aspects to be seriously addressed while designing any future launch vehicle.

Unnikrishnan Nair S. is former director, VSSC and IIST; founding director, IISFC; and an expert in launch vehicle systems, orbital re-entry, and human spaceflight technologies.

Core Issues and Analysis

Economics of Space Access

Traditional expendable rockets dedicate over 90% of their mass to propellant and tankage, leaving less than 4% for payload due to constraints explained by the Tsiolkovsky rocket equation.

Reusable rockets reduce launch costs by a factor of 5–20 per kg, primarily by recovering and reflighting high-value components such as the first stage.

Human spaceflight remains 3–5 times costlier than satellite launches due to life-support, safety, redundancy, and certification requirements.

Role of Reusability and Staging

Staging historically mitigated mass penalties by discarding spent stages. However, this led to high recurring costs.

Reusability, particularly of the first stage, addresses this inefficiency. The Falcon 9 demonstrates controlled re-entry and vertical landing using retro-propulsion and aerodynamic braking.

SpaceX has recovered Falcon 9 first stages over 520 times, with individual boosters flying 30+ missions, highlighting the operational feasibility of multi-use hardware.

Technological and Material Constraints

Reuse limits are set by structural fatigue, thermal cycling (cryogenic to combustion temperatures), pressure loads, and g-forces.

Beyond a threshold, refurbishment and inspection costs may outweigh the benefits of reuse, making lifecycle economics crucial.

Global Developments

Companies such as Blue Origin (New Glenn) and Chinese firms like LandSpace (Zhuque-3) indicate a global race toward partial and full reusability.

Fully reusable systems, such as SpaceX's Starship, aim to support deep-space missions to the Moon and Mars, significantly expanding human spaceflight capabilities.

India's Position

ISRO is pursuing recovery technologies through the Reusable Launch Vehicle (RLV) programme and first-stage recovery concepts using aerodynamic drag and retro-propulsion.

While progress is steady, India faces competitive pressure as reusability becomes a standard feature rather than an experimental one in global launch markets.

Implications for UPSC Dimensions

Science & Technology: Advances in propulsion efficiency, materials, and autonomous guidance systems.

Economy: Lower launch costs enable satellite constellations, space-based services, and private investment.

Environment & Sustainability: Reduced space debris and material wastage through reuse.

Strategic & Governance: Commercial dominance in launch capabilities has implications for national security and space diplomacy.

Conclusion

Reusability represents a paradigm shift in space access, transforming rockets from single-use assets into repeatable transportation systems. As launch costs decline and mission frequency increases, space is becoming more accessible, sustainable, and commercially viable. For India, integrating disruptive technologies, reducing stage count, and making reuse a non-negotiable design principle will be essential to remain competitive. The future of space exploration and utilisation will belong to nations and companies that successfully combine technological innovation with sound lifecycle economics.

UPSC Prelims Exam Practice Question

Ques : With reference to reusable launch vehicles, consider the following statements:

1. Reusability significantly reduces the cost per kilogram of payload sent to space.

2. The first stage of a rocket is the most expensive component and hence the primary target for reuse.

3. Fully reusable launch vehicles are already the dominant mode of access to space worldwide.

Which of the statements given above is/are correct?

(a) 1 and 2 only

(b) 2 and 3 only

(c) 1 only

(d) 1, 2 and 3

Ans: (a)

UPSC Mains Exam Practice Question

Ques : Reusable rocket technology is widely regarded as a game-changer for sustainable and affordable access to space. Explain the technological and economic rationale behind this shift. **(150 words)**

Page : 08 : Editorial Analysis

The 'Donroe doctrine', a broken international order

M.K. Narayanan

is a former Director, Intelligence Bureau, a former National Security Adviser, and a former Governor of West Bengal

The new year began with a stark reminder that the over 200-year-old 'Monroe Doctrine' is not merely alive but has been given a fresh dimension, in keeping with the personality of United States President Donald Trump. In a swift operation as 2026 unfolded, U.S. airborne troops abducted Venezuelan President Nicolás Maduro and his wife and incarcerated them in the U.S. on charges of undermining the security of the U.S. This action is being sanctified as the new 'Donroe Doctrine'.

Actions under the Trump administration

Protests worldwide against the U.S.'s action in violating the sovereignty of Venezuela have, however, been rather muted. This seems to convey the belief that the post-1945 international order is dead, and what exists now is a 'free for all' in the global commons. Voices are also being heard 'sotto voce', that the latest action by the U.S. might well become a prelude for similar actions by nations such as China and Russia to lay claim to countries and regions falling within their zone of influence – China's claim to Taiwan being one.

The action carried out has been characterised by Mr Trump himself as a modern version of the (1823) Monroe Doctrine, *viz.*, that the U.S. is the sole guarantor of security in the Western Hemisphere and would not brook any interference by powers outside the Hemisphere. A careful reading of President Trump's latest U.S. National Security Strategy, or NSS (November 2025) – which unequivocally states that after years of neglect, the U.S. expects to reassert its pre-eminence in the Western Hemisphere, denying non-Hemispheric competitors the ability to position forces or threaten U.S. vital assets in the Hemisphere – would suggest that the Venezuelan operation was a carefully thought through manoeuvre, and an updated 21st century version of 'US shock and awe' tactics. There is even an implicit threat of actions similar to Venezuela against Cuba, Colombia and Mexico. There is again an implicit reference to taking control of Greenland which is viewed by the U.S. as a security necessity.

From a U.S. perspective, it would seem that 2026 could see significant changes in different regions of the globe. Europe, for instance, which has come in for sharp criticism in the NSS document, has been excoriated on the ground that it had lost most, if not all, its sheen, alongside the suggestion that the U.S. could help Europe regain its former greatness if it backed patriotic European parties and 'genuine democracy'. The NSS document wants Europe to assume 'primary responsibility for its own defence', alongside a veiled reference to achieving strategic stability with Russia.

Going beyond Mr. Trump's NSS, realistically speaking, it would seem that the conflict in Ukraine, which appears stalemated at present, could move toward resolution, but which could be unsatisfactory to both sets of antagonists. The alternative, according to U.S. policymakers, appears to be that otherwise, it could lead to further escalation, alongside fears that it would engulf more regions of Europe.

It is a mixed bag as far as the global outlook for 2026 is concerned, marked by an updated version of the U.S.'s 'shock and awe' tactics

The situation closer to India

The situation in West Asia, it would seem, is beginning to resemble the proverbial curate's egg, good in parts. Israel's pogrom has come to an end for the present, but peace in the regime remains highly elusive. The situation in Gaza, in particular, remains highly sensitive and violence seems for the most part just round the corner.

Meantime, the growing violence and unrest that have engulfed Iran and the Khamenei regime is acting as a catalyst for a fresh round of conflict in and across the region. Iran is witnessing widespread internal violence, and the declared that it is "fighting on four fronts, *viz.*, an economic war, a psychological war, a military war against the US and Israel, and 'a war on terrorism'". The West has responded with warnings of imposing additional sanctions on Iran. Implicit in all this, is that both Israel and the U.S. see an opportunity to complete the unfinished conflict of 2025, and ensure that it reaches a 'satisfactory conclusion' in undermining the Khamenei regime in Iran.

Northwest Asia, specially Afghanistan, is meanwhile, set to confront more troubles this year. The Tehreek-e-Taliban and other Afghan terrorist groups appear, of late, to have gained a fresh lease of life, and this spells problems for Pakistan as well. The Afghanistan-Pakistan border will, hence, continue to remain troubled during much of this year. So, 2026 is again, not likely to be a good year for democracy in Pakistan, with the military taking firmer control of the country's affairs and Field Marshal Asim Munir eclipsing the importance of Prime Minister Shehbaz Sharif, striking another blow to the country's democratic trajectory. However, Pakistan does appear to have gained a fresh lease of life, with the U.S. embracing it as an ally, promising a fresh tranche of state-of-the-art weapons, and in some ways being perceived as 'the most favoured nation of the US' in this part of the world. Meantime, uncertainty about the future of democracy will continue to prevail in the highly troubled state of Bangladesh, notwithstanding the promise of fresh elections and restoration of an elected government.

For China, 2025 seemed like a good year. While China-U.S. rivalry appeared to intensify, Beijing successfully withstood the tariff barrage unleashed by Mr. Trump, and even seemed to turn it to its advantage. China raised the value of its manufacturing and also demonstrated its hold over global supply chains.

China's restrictions on rare earth exports in the tussle with the U.S., seemed to enhance its ability to not only withstand U.S. pressures but also to convert the situation in its favour. While there were few opportunities for a trial of strength in the Pacific, China's growing presence in Southeast Asia is adding to China's importance in Asian and world affairs. It is increasingly becoming apparent as well that the Eastern Pacific is no longer a U.S. bailiwick. China's presence in the Indian Ocean is also growing and represents not only a major threat to nations bordering the Indian Ocean but, more importantly, also a challenge to U.S. supremacy here.

Notes for New Delhi

As 2026 progresses, India appears to stand at the crossroads, unsure as to where it stands. There has been no letup in Mr. Trump's tirade against India for continuing to import subsidised Russian oil, notwithstanding the fact that India is inclined to side with the U.S. on most matters. An implicit coldness in India-U.S. relations seems to be affecting India's relations with many other countries, resulting in New Delhi's relative isolation when it comes to conflict zones such as West Asia. Mr. Trump's public endorsement of Field Marshal Munir and the lifting of restrictions on arms supplies to Pakistan is also not helping. Despite this, there have been some positive developments with regard to an expansion of India-U.S. cooperation in some areas. Several mini-lateral initiatives, such as the I2U2 (India, Israel, the U.S., the UAE) and the India-Middle East-Europe Economic Corridor appear to be progressing.

As of now, Washington's foreign policy calculus and Beijing's disinterested approach to India are putting India at a disadvantage in political and economic terms, especially the latter. China's tactical advantage in trade and tariff disputes leaves little room or scope for India to hedge against U.S. threats to further raise tariffs on trade, thus aggravating current anxieties. For India, there is again little room for comfort in the fact that China's economic growth has not picked up of late, or that its domestic consumption remains stagnant. All this is notwithstanding an improvement in India-China ties following the Tianjin meeting of Prime Minister Modi and President Xi Jinping in 2025. A further stabilisation of India-China ties does not, however, appear likely in 2026.

Overall, 2026 may not have any great prospects for India. It may not, however, face any major terror attack during the year, but terrorism will remain an ever-present reality. West Asia having just undergone a sustained military campaign by Israel may be spared major terror attacks, but the upheaval in Iran and the attempt by Israel and the U.S. to wade into troubled waters could instigate some terror attacks. The Islamic State and al Qaeda seem better positioned in Africa as of now, but this is no reason to let one's guard down, as, overall, more attacks by insurgent and terrorist entities can be anticipated in Asia, West Asia and Africa. Terrorism could, hence, be regarded as a critical national security threat during 2026.

GS Paper II : International Relations

UPSC Mains Practice Question: How does the revival of sphere-of-influence politics by major powers challenge the principles of sovereignty and non-intervention? Discuss with reference to developments in Latin America, Europe, and the Indo-Pacific. **(250 Words)**

Context :

The article highlights a fundamental shift in the post-1945 international order, marked by the emergence of what is termed the "Donroe Doctrine" — a personalised, coercive reinterpretation of the Monroe Doctrine (1823) under U.S. President Donald Trump. The alleged U.S. action against Venezuela symbolises a departure from multilateralism and respect for sovereignty, suggesting a world increasingly governed by power politics rather than rules-based norms.

Core Arguments and Analysis

Erosion of the Rules-Based International Order

The muted global response to U.S. unilateral action reflects the weakening of institutions and norms established after 1945, particularly respect for sovereignty and non-intervention.

The article argues that the world is drifting toward a "free-for-all" system, where great powers assert spheres of influence without restraint, potentially legitimising similar actions by **China** and **Russia**.

Revival and Expansion of Sphere-of-Influence Politics

The updated Monroe Doctrine, as articulated in the 2025 U.S. National Security Strategy, asserts U.S. primacy in the Western Hemisphere and seeks to exclude extra-regional powers.

This has implications beyond Latin America, including potential precedents for China's position on Taiwan and Russia's posture in Eastern Europe.

Regional Implications

Europe: Pressured to assume greater responsibility for its defence, alongside U.S. attempts to recalibrate relations with Russia and end the Ukraine conflict on terms that may dissatisfy all parties.

West Asia: Fragility persists despite pauses in active conflict. Instability in **Iran**, combined with U.S.–Israeli strategic calculations, risks renewed regional escalation involving **Israel**.

South Asia: The resurgence of militancy in Afghanistan and growing instability in **Pakistan** point to democratic backsliding and heightened security risks.

China's Strategic Positioning

China has leveraged trade disputes and rare earth dominance to strengthen its manufacturing base and supply-chain leverage.

Its expanding presence in Southeast Asia and the Indian Ocean challenges U.S. maritime supremacy and reshapes the Asian balance of power.

Implications for India

India finds itself strategically constrained: facing U.S. pressure over Russian oil imports, limited economic leverage against China, and renewed U.S.–Pakistan proximity.

While minilateral initiatives such as I2U2 and the India–Middle East–Europe Economic Corridor offer opportunities, India's strategic autonomy is under stress in an increasingly polarised world.

UPSC-Relevant Dimensions

International Relations: Decline of liberal internationalism; return of power-based geopolitics.

Security: Terrorism remains a persistent, trans-regional threat despite shifting epicentres.

India's Foreign Policy: Challenges to strategic autonomy, balancing relations with the U.S., China, and regional partners.

Global Governance: Weakening of multilateral institutions and norms.

Conclusion

The "Donroe Doctrine" symbolises a decisive break from cooperative global governance toward unilateral assertion of power and spheres of influence. As great powers prioritise national interest over international norms, the global order risks fragmentation and instability. For India, 2026 presents limited strategic comfort: while major shocks may be avoided, persistent terrorism, regional instability, and great-power rivalry will continue to test its diplomacy and security calculus. In such an environment, safeguarding strategic autonomy while deepening selective partnerships will be critical for navigating a disorderly world.