

PSIR & GS-2 Daily Brief

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Gulf's geopolitical predicament cannot be solved : Indian Express

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US - Iran crisis & global energy geopolitics : ORF

Article - 1: Gulf's geopolitical predicament cannot be solved.

Gulf's geopolitical predicament cannot be solved. It can only be managed



RAJA MANDALA
BY C RAJA MOHAN

weaker Gulf states while maintaining a working relationship with Tehran. The decline of Britain, its withdrawal from the east of Suez, the independence granted to Gulf kingdoms in 1971, and the Islamic Revolution of 1979 together marked the demise of the old regional order.

The Islamic Republic did not invent Iranian assertiveness — it inherited it from the Shah and intensified it. Mohammad Reza Shah had already demonstrated Iran's hegemonic instincts before the revolution. He seized the islands of Abu Musa and the Tunbs from the nascent UAE on the eve of the British withdrawal in 1971. He claimed Bahrain as Iran's 14th province until international pressure forced a tactical retreat. He deployed thousands of troops to Oman's Dhofar province to crush a left-wing insurgency — not out of altruism, but to establish Iran as the Gulf's indispensable security arbiter. He built the most powerful military force in the developing world, positioning Tehran as a regional gendarme with American blessing.

The Islamic theocracy has been even more vigorous in pursuing regional hegemony, but in opposition to Washington rather than in partnership with it. Both monarchy and theocracy made similar mistakes: In focusing on external adventures, they exacerbated domestic unrest.

A popular slogan from Iran's recent protests captures the contradiction: "No to Gaza, No to Lebanon... my life is for Iran."

When Iran transitioned from a monarchy to the Islamic republic, the underlying logic of Iranian hegemonic ambition did not change. Ayatollah Ruhollah Khomeini re-

placed Persian nationalism with Shia revolutionary ideology, but the instruments — proxy forces, interference in neighbours' affairs, projection of military power — differed little from the Shah's playbook. The difference lay in ferocity and religious fervour.

The conservative Gulf Arabs responded by establishing the Gulf Cooperation Council in 1981 to pool resources against the Islamic Republic. The GCC has barely limped along, hobbled by internal divisions. In a telling paradox, the Gulf Arabs turned to Iraq's secular dictator, Saddam Hussein, to contain revolutionary Iran. Eight years of the Iran-Iraq War kept Iran at bay, but at great cost. And the counterweight proved double-edged: The same army that bled Iran rolled into Kuwait in 1990. The Arab shield had turned on those it was meant to protect. American intervention expelled Iraq from Kuwait in 1991 but did not resolve the underlying structural imbalance. It merely replaced Iraqi protection with a direct American military presence on the Arabian Peninsula. A brief debate about a "Gulf NATO" never took off.

The Arabs also encouraged radical Sunni forces to fend off the Shia threat from Tehran. That strategy backfired spectacularly on September 11, 2001. After 9/11, the United States made the fateful decision to destroy the Iraqi state, disband the Ba'athist military, and hand Tehran the geopolitical windfall it had spent eight years fighting to prevent. Iran's Shia allies now ruled in Baghdad. The land route from Tehran to Beirut became a physical reality. Iranian proxies strutted across the region. The Gulf Arabs were left staring at an Iranian sphere of influence stretching from

the Zagros mountains to the Mediterranean. The rise of Iranian power also drove a quiet rapprochement between Israel and the Gulf Arabs, adding a new strategic wrinkle.

Where does the regional balance go from here? The US, Israel, and the Gulf Arabs want a credible defanging of Iran's missile and nuclear capabilities. They want Iran to relinquish its proxy forces and stop meddling in Arab internal affairs. They also seek the internationalisation of the Strait of Hormuz to guarantee freedom of navigation. Iran has its own demands. It insists on its right to develop nuclear and missile technologies. It wants guarantees against future American military action, an end to US bases in Arab states, compensation for wartime damages, and a veto over governance of the Hormuz.

This brings us back to the central problem. Iran is too strong to be ignored, but not strong enough to exercise unilateral dominance. The Gulf Arabs cannot balance Iran on their own and will continue to depend on the US for security. No other power — not Russia, not China, let alone Europe or India — can replace Washington as the ultimate security guarantor of the Gulf Arabs. Notwithstanding the flicker of hope offered by Trump's pause, the tragic cycle of the impossible balancing between Arabia and Persia is likely to continue. The Gulf's geopolitical predicament is not one that can be solved. It can only be managed — just barely, and with a great deal of luck.

The writer is a contributing editor on international affairs for The Indian Express. He is associated with the Motwani Jadeja Institute of American Studies, Jindal Global University, and the Council on Strategic and Defense Studies, Delhi

Context This article discusses the deep seated geopolitical imbalance in the Persian Gulf, where the sheer size & ambition of Iran (Persia) naturally dwarf its smaller Arab neighbors (the GCC).

Facts

Demographic Asymmetry: Iran's population of 90 million significantly outweighs the 27 million citizens of the GCC states combined.

Historical Security Arbiter: Before 1971, Great Britain (operating from subcontinent) acted as the primary stabilizer in Gulf.

The 1971 Shift: Iran seized islands of Abu Musa & Tunbs from UAE immediately following British withdrawal.

The Iraq Paradox: The GCC supported Saddam's Iraq as a "shield" against Iran, while Iraq invaded Kuwait.

Analytical Crux

In simple terms, the "Gulf Problem" is a math problem that doesn't add up. Iran is a large, unified power with a long history of wanting to lead the region, whether under a King or a cleric. Its neighbors are smaller, divided kingdoms that cannot defend themselves alone. Because they can't balance Iran themselves, they "outsource" their security to the US. This makes the region's safety dependent on whoever is in the White House. The article suggests that while "pauses" in fighting are good, a permanent peace is unlikely because the fundamental gap in power between the two sides of the Gulf is too wide to bridge.

Verbatim Quotes

"It is hard to square the circle of power asymmetry between Iran and its Arab neighbours that lies at the root of Gulf insecurity."

"The Islamic Republic did not invent Iranian assertiveness - it inherited it from the Shah and intensified it."

"The Gulf's geopolitical predicament is not one that can be solved. It can only be managed with a great deal of luck."

Article - 2: China is squeezing Southeast Asia

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China Is Squeezing Southeast Asia

As Imbalances Grow, a Backlash Is Brewing

JESSICA C. LIAO AND ZENEL GARCIA

March 24, 2026



JESSICA C. LIAO is Associate Professor of Asian Studies in the Department of National Security and Strategy at the U.S. Army War College.

ZENEL GARCIA is Associate Professor of Security Studies and Henry L. Stimson Chair of International and Military Studies in the Department of National Security and Strategy at the U.S. Army War College.

Context This article examines the complex & increasingly strained economic relationship between China & Southeast Asia. The "second China" shock is now causing trade deficits to balloon & local industries to struggle.

Facts

In 2024, the ASEAN trade deficit with Beijing reached roughly \$140 billion, leap from just over \$10 billion in 2010.

Southeast Asia's contribution to global manufacturing value-added has remained stagnant at 5% for a decade.

As of 2025, ASEAN placed countermeasures on less than 7% of subsidized Chinese exports, compared to 12-15% by G7 nations.

Analytical Crux

Traditional "Flying Geese" model of development - where a lead economy (China) passes maturing industries down to its neighbors - has broken. Instead of a ladder to growth, Southeast Asia faces a "second China shock" characterized by a massive trade deficit & "flightless" industries. This is happening because China is using automation & subsidies to keep even low-end manufacturing at home, while ensuring that high-tech investments in ASEAN remain self-contained, using Chinese parts and labor rather than local ones. Consequently, the region is becoming a mere assembly byway for Chinese goods, problem worsened by local "patronage networks" and weak regulations that prioritize short-term Chinese capital over long-term national industrialization.

Verbatim Quotes

"China's economic gravity is suffocating the very economies it has promised to lift."

"Southeast Asia is merely a byway for China to ship its goods elsewhere."

Article - 3 : US - Iran crisis & global energy geopolitics

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The US-Iran Crisis and Global Energy Geopolitics

AUTHOR : HARSH V. PANT

Originally Published *Business Standard* Published on Mar 24, 2026



Iran's decision to shut off the Strait of Hormuz on March 1 was not merely an act of retaliation; it was a calculated demonstration of its enduring capacity to disrupt the global commons

Author



Harsh V. Pant

Professor Harsh V. Pant is Vice President at Observer Research Foundation, New Delhi. He is a Professor of International Relations with



Context The ongoing conflict between US & Iran has rapidly expanded from a limited military operation into a wider struggle impacting global energy systems. The closure of the Strait of Hormuz has turned the conflict into a global economic concern.

Facts

- The Strait of Hormuz carries ~20% of global oil & LNG flows, making it world's most critical energy lane.
- The conflict has expanded to include critical infrastructure such as ports, desalination plants and airports.
- Iran has used asymmetric tactics like tanker interdictions & GPS disruption to raise global costs.
- Major energy hubs like South Pars (Iran) and Ras Laffan (Qatar) have been directly targeted.

Analytical Crux

The article argues that modern wars are no longer limited to military battles but increasingly target economic systems, especially energy networks. In this case, Iran is leveraging its geographic advantage over the Strait of Hormuz to disrupt global energy supply, while its adversaries are targeting key energy infrastructure. This shows how deeply interconnected the global economy is—regional conflicts can quickly trigger worldwide economic shocks. It also highlights a shift toward asymmetric warfare and economic coercion, leading to a more unstable and fragmented global order.

Verbatim Quotes

“When military objectives collide with structural economic dependencies, conflicts rarely remain confined to their original intent.”

“The distinction between civilian and military assets is increasingly blurred.”

“Energy is both the instrument and the battleground of power.”

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