

## ABOUT THIS INITIATIVE

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Perspectives on the West Asian conflict, on the Editorial and Opinion pages

## The Iran war intensifies India's strategic challenge

The Iran war is not a war to eliminate the "imminent threat" to the United States. Neither is it a pre-emptive strike to stop Iran from striking Israel or American assets. Nor is it a war to stop the rebuilding of Iran's nuclear programme. It is not even a war to destroy Iranian ballistic missiles.

**Eliminating an ideology**  
It is a war to destroy the ideology which drives the Iranian government. And as Israel and the U.S. claim, regime change is the path to achieve it. The U.S. has joined Israel to actively prosecute the war by owning this idea.

Iran is seen as the great disrupter of West Asia. Israel wants to end Iran's proxy war which it sees as an existential threat. This means asphyxiating Iranian support to non-state actors in the region that are inimical to Israel. This again means eliminating the ideology (as opposed to the religion) — effectively a regime change.

Iran has consistently nurtured and used non-state actors to wage a proxy war against Israel. In fact, some non-state actors have quite literally become a state within a state and destabilised them. The Iranian-backed Hezbollah in Lebanon occupies parts of Lebanon and has even held up the formation of governments. The Iranian-backed Houthis in Yemen have carved out a large chunk of Yemen. Houthi missiles hit Saudi Aramco installations in 2021 serving as a catalyst for Saudi Arabia and Iran to restore diplomatic relations in 2023. Iraqi Shia non-state militia are also supported by Iran.

It was Iran's support for Hamas' brutal attacks of October 7, 2023, which exposed Iran's proxies to fierce Israeli retaliation and eventual degradation. Ironically, Hamas itself was initially propped up by Israel (later by Qatar) to weaken Yasser Arafat and the Palestine Liberation Organization, split the Palestinians and discredit the Palestinian Authority. When this writer lived in Gaza, the co-founder and spiritual guru of Hamas, Sheikh Ahmed Yassin, was released in 1997 and sent to Gaza by Israel precisely for this.

Iran's ideology of exporting instability unnerved the region, especially the Gulf monarchies where public opinion is controlled. Consequently, under American prodding, the Gulf states began signing the Abraham Accords to normalise relations with Israel to stabilise the region at the cost of even the Palestinian issue.

If Israel and the U.S. are going after Iran again, when their June 2025 bombing campaign effectively buried the Iranian nuclear enrichment process, then it can only be for a much bigger goal — elimination of Iranian radical ideology and regime change. The attacks on Iran have caused unprecedented devastation on military and security apparatus as well as oil and other infrastructure, hoping to break the cohesion of governance structure and provoke the people to



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overthrow the government. U.S. President Donald Trump even promised to Make Iran Great Again. Can regime change be effected by mere air bombings on military and civilian targets? This has not happened so far and Israelis and Americans are reluctant to put boots on the ground.

The Iranians, having borne the brunt of the June 2025 war, are prepared for the worst. Since Iran's Supreme Leader Ayatollah Ali Khamenei never tried to hide and, in fact, welcomed martyrdom, it did not require special intelligence information to kill him. Anticipating such assassinations, Iran has decentralised authority across multiple arms of government and decided that the period of strategic restraint, as in 2025, is over. Facing an asymmetry in firepower, Iran has widened the war to include regional targets beyond U.S. bases in the Gulf, making this conflict as much political as it is military. It has exposed the U.S. security umbrella over the Gulf states, shown the Gulf states as vulnerable and put the energy security of many countries at serious risk. The pressure is clearly on the U.S. to end the war early.

Israel's view of the endgame differs from that of the U.S.: Israel has no compunctions about pursuing a purely military campaign regardless of the internal, regional, or political fallout, whereas America cannot afford to leave behind an Iran in turmoil without a political settlement for the region. This raises the hope that the Iran campaign will be shorter.

### America's mixed messaging

Mr. Trump dislikes getting bogged down in long conflicts. He stabilised the situation in Venezuela by working with the same but more pliable regime, after abducting its President, and in Syria by sanctifying a former ISIS terrorist leader as President. He is eyeing a quick regime change in Cuba now. Last year, he reached a deal with the Houthis to prevent attacks on American ships. With Iran threatening to attack ships passing through the Strait of Hormuz, Mr. Trump is discovering that West Asia is not Latin America, and Iran is not Venezuela. The war is not ending as quickly as Mr. Trump would like. Hence, the mixed messaging from the U.S. — whether to stop and declare victory or to prolong the conflict, risking global economic disruption, regional and American casualties, and political resistance both in Congress and among the public. The U.S. has just requested India to buy more Russian oil to stabilise prices.

The Americans getting bogged down in West Asia can only gladden China and Russia since the U.S. will have less bandwidth to focus on them. With each day of relentless attacks, China's case for taking over Taiwan grows stronger, while

Russia's logic in the Ukraine war is reinforced. Rising oil prices are good for Russia but not China. But a distracted U.S. is not good news for India, which is hoping to attract greater U.S. attention after the trade deal and find a place in the world view of Mr. Trump.

### India and regional policy

India's role as an observer at Mr. Trump's first Board of Peace meeting in Washington DC., indicated a welcome willingness to take a more proactive role in the region. While India immediately reached out to meet the needs of the Indian community in the Gulf, it slipped back to default mode when Khamenei was assassinated and when an Iranian navy vessel leaving Indian shores was torpedoed by a U.S. submarine in the high seas. Yes, India has excellent bilateral relations with the Gulf, Israel and many regional countries. But with India's stakes in the region, including in Iran, a more balanced regional policy is essential, at the very least to manage contradictions between friends, such as the recent schism between Saudi Arabia and the Emiratis. Regional policy is much more than an aggregation of many bilateral relations, whether in tackling West Asia, Europe, Central Asia or South-East Asia.

The Iran war is the American way of attempting to reorder West Asia, though it has only exposed the inability of the U.S. to protect the Gulf states. Mr. Trump has reordered the transatlantic alliance amicably when the Europeans caved in to everything that he asked. The U.S. attempt to reorder its relations with Russia met with Russian President Putin's resistance. The world will soon witness a reordering of U.S.-China relations when Mr. Trump and Xi Jinping meet soon — an event being watched anxiously by Japan, South Korea, India, and, of course, Taiwan, to see whether Mr. Trump will end up making not MAGA, but MCGA: Make China Great Again.

The strategic and security architecture of the region will now have to be rewritten. Ironically, Iran has effectively pushed the region even deeper into America's arms. Whether China or Russia can offer counter-security arrangements is debatable. Israel will continue to be a predominant force in the region. But others will also benefit such as Türkiye, Saudi Arabia and even Pakistan. With a strong Iran out of the way, their ambitions and stock will rise to fill the regional space.

This is not good news for India. With its strategic space constricted by both the U.S. and China, the Iran war is having a much greater impact on India than it anticipated. India's neighbourhood has just become that much tougher to negotiate.



The ongoing war will have a much greater impact on India than it had anticipated, forcing New Delhi to navigate complex regional dynamics

**Context** The escalating US-Israel war with Iran is reshaping west Asian geopolitics & forcing India to navigate complex strategic challenges.

## Facts

- Iran has cultivated & supported non-state armed groups across region such as Hezbollah in Lebanon and Houthi movement in Yemen.
- Nearly 9 million Indian live in Gulf.
- Remittances from the Gulf account for about 1.2% of India's GDP.

## Theoretical lens + Verbatim Quotes

“Iran has built an extensive network of regional proxies that allows it to exert influence without direct confrontation.”

“History shows that regime change wars rarely produce stable outcomes.”

## Analytical Crux

The Iran conflict reflects a deeper regional power struggle over West Asian order, with attempts to curb Iran's strategic influence.

Iran's reliance on proxy militias shows the growing role of asymmetric warfare in regional geopolitics.

Prolonged instability in the Gulf threatens global energy flows and maritime security.

For India, the crisis creates a three-fold challenge: energy security, safety of diaspora and diplomatic balancing.

The situation reinforces the importance of strategic autonomy in India's West Asia policy.

# National interest is not at odds with core values. Recalibrate foreign policy



SALMAN KHURSHID AND PUSHPARAJ DESHPANDE

**C**ODENAMED OPERATION Epic Fury by the US and Roaring Lion by Israel, the "preemptive war" on Iran interrupted active diplomacy, purportedly to "remove existential threats". Analysing the Heritage Foundation's Project 2025 (which US President Donald Trump's administration has operationalised substantially), this war was a calculated bid to redraw the balance of power in West Asia, free up geostrategic bandwidth for the Indo-Pacific, disrupt China's oil lifelines from Venezuela and Iran (although with almost 1 billion barrels stockpiled, China is insulated), reassert the petro-dollar's hegemony (both Venezuela and Iran were trading in non-dollar currencies) and curb Iran's drone supplies to Russia for deployment in Ukraine. India must urgently recalibrate to counter these tectonic global shifts, for which External Affairs Minister S Jaishankar's vapid parliamentary statement offers no blueprint.

US-Israeli forces assassinated Supreme Leader Ayatollah Ali Khamenei to paralyse Iran's command structure and trigger internal upheaval. They also dropped 2,500 bombs across 131 Iranian cities in the first 30 hours, targeting missile launchers, drone manufacturing units and economic infrastructure. Meanwhile, the Western alliance enhanced naval deployments across West Asia. Despite this, victory eludes the US-Israel axis because Iran has chosen the Samson option. Epic Fury/Roaring Lion has hardened public opinion within Iran, which was inevitable given the killing of the Ayatollah and over 1,200 Iranians, including schoolchildren, during Ramzan. Tehran's Operation True Promise 4 has become an attrition war.

Lacking conventional parity, Iran is retaliating asymmetrically — redefining escalation thresholds to exhaust US-Israeli defensive systems. To deter deeper allied

engagement, it is also widening the battlefield by striking military bases, data centres, energy infrastructure, consulates, and transport hubs in the Gulf monarchies. The de facto closure of the Strait of Hormuz has exacerbated this. Furthermore, Iran's new leadership has decentralised powers across ministries and provincial administrations to circumvent the targeting of Iran's intelligence, internal security and institutional architecture, and activated the Axis of Resistance.

The downstream consequences of this war will engulf the whole world. For example, major maritime insurers, including Lloyd's (which underwrites 40 per cent of marine cargo), Gard, Skuld, North Standard, the London P&I Club, the American Club and MS&AD Insurance Group are cancelling war risk coverage for vessels. Without insurance, West Asia shipping will halt, and companies will not be able to raise capital or participate in public markets. A global insurance repricing could even trigger a financial crisis.

Unfortunately, the BJP government has plunged India into a (geo)economic and strategic whirlpool. First, over 50 per cent of India's LNG imports, 50 per cent of crude oil imports, and over 90 per cent of LPG imports come from West Asia, mostly routed through the Strait of Hormuz. Given that India reduced Russian oil imports to 19.3 per cent of total oil imports by January 2026 (although the US has deigned to "grant" a 30-day OFAC waiver), we are unsustainably dependent on oil from Gulf states and US-controlled Venezuela. Volatility in oil markets will invariably spark socio-economic volatility domestically. For every \$10 rise in crude prices, India's import bill will jump by \$13-14 billion annually, drive consumer inflation by 35 basis points and

shave 30 basis points off economic growth. This will also impact the rupee, which is hurtling toward the 100 per-dollar cliff. To tackle these, the RBI may hike interest rates, further suppressing private investment.

Second, with six of India's largest Gulf trading partners now in active conflict zones, trade with the GCC (totalling \$178.7 billion) will be disrupted. For example, 60 per cent of the LNG used for urea manufacturing is imported from Qatar. This being halted will impact fertiliser subsidies and deepen the woes of Indian farmers. Likewise, Indian households will also face acute cooking gas shortages with LPG imports under threat. Similarly, Indian exports to non-West Asian markets will dampen because air and sea shipments are facing high premiums.

Third, over 9 million Indians living in West Asia remit \$40 billion annually, accounting for 55 per cent of India's total remittances. Beyond the BJP government's failure to protect diaspora Indians, a stressed labour market will adversely affect remittances, which will compress mass-market consumption and impact growth, given remittances contribute 3.4 per cent to GDP.

Fourth, the vilification of Iran seeks to legitimise the BJP government's implicit approval of kinetic action violating the UN Charter. Without discounting our strategic partnership with Israel — which enjoys bipartisan support — we must recognise that Iran consistently supported India with discounted oil, a base for covert operations

against Pakistan, counterbalancing Azerbaijan (which supports Pakistan), a strategic link to Afghanistan and Central Asia, and with the Shahid Beheshti terminal at Chabahar (which counterweights Pakistan-China's Gwadar Port). Disregarding these investments, the BJP ecosystem is gratuitously antagonising Iran just as it

did with Bangladesh, overlooking that a weakened Iran strengthens Turkey, Pakistan's key ally.

Given our civilisational, geo-economic and strategic stakes in West Asia, the BJP government should ideally have deployed India's relationships, painstakingly forged since Independence, to de-escalate and reassert that security, sovereignty, justice and prosperity are inalienable public goods. Instead, Prime Minister Narendra Modi's visit to Israel on the war's eve created the perception of an endorsement — both of military escalation, and of PM Benjamin Netanyahu's Likud party before Israel's elections. This perceived sanction of coercive unilateralism undermines India's legitimate position on Pakistan-Occupied Kashmir. The BJP government has compounded this by tacitly condoning the assassination of a sovereign nation's leader and the Iranian warship's sinking in our strategic backyard, as well as by abdicating leadership of BRICS. Unfortunately, the Modi doctrine of foreign policy has made India complicit in dismantling the rules-based world order, edges us towards vassalage and compromises our strategic interests.

Prime Minister Jawaharlal Nehru famously asserted, "The objectives of our foreign-policy are the preservation of world peace and enlargement of human freedom... Where freedom is menaced or justice threatened or where aggression takes place, we cannot be and shall not be neutral." This means pursuing both our national interests and advancing our core values. Only through an urgent recalibration of our foreign policy and return to a principled middle path can India reclaim leadership of the Global South, and realise our manifest destiny.

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Without discounting our strategic partnership with Israel — which enjoys bipartisan support — we must recognise that Iran consistently supported India

## Verbatim Quotes

“National interest is not at odds with core values.”

“Volatility in oil markets will invariably spark socio-economic volatility domestically.”

## Context

India should recalibrate its West Asia policy by aligning national interest with its core values of strategic autonomy, global law & humanitarian responsibility.

## Facts

- Over 9 million Indians live in West Asia and remit about \$40 billion annually.
- West Asia contributes roughly 55% of India's remittances.
- Remittances account for about 3.4% of India's GDP.

## Theoretical lens

The arguments combines realist concern for national interest with a normative defence of values - based strategic autonomy.

## Analytical Crux



India's foreign policy must reconcile realist national interests with normative commitments to sovereignty, international law and strategic autonomy, especially in volatile regions like west Asia. A balanced middle-path diplomacy - engaging all sides while resisting bloc politics - best protects India's energy, diaspora and strategic interests while sustaining its credibility as a Global South leader.

# The Postliberal Superpower

*What Abandoning Democratic Allies Will Cost America*

MICHAEL CARPENTER

March 9, 2026



MICHAEL CAI  
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**Context** The article argues that U.S. FP under Trump reflects a postliberal, domestically driven shift that weakens alliances with democratic partners & undermines America's global leadership.

## Theoretical lens + Verbatim Quotes

“Those fixated on explaining the Trump administration's policies with realism miss a central & indeed growing feature of today's geopolitics - projection of domestic governance struggles into international arena”

## Facts

- 2026 National Defense Strategy: rejects the rules-based international order and promotes “hardnosed realism”
- Direct U.S. military aid to Ukraine was terminated, leaving only indirect sales via defense contractors.

## Analytical Crux

- ➔ The current U.S. foreign policy is not driven by classical realism, because it is not balancing against rivals like China and Russia.
- ➔ Instead, domestic ideological politics ("postliberalism") is shaping foreign policy choices and alliance behaviour.
- ➔ As a result, the U.S. is clashing with democratic allies while showing accommodation toward authoritarian powers.
- ➔ This shows a pattern where regime ideology increasingly determines international alignments.
- ➔ The risk is that weakening alliances with democracies may erode the main source of American global power.

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