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The Return of Industrial Statecraft in Geopolitics and Warfare

Prerna Gandhi, Associate Fellow, VIF

July 21, 2026 Views: 979 Comments: 0

As numerous regional conflicts continue unabated, the characterization of contemporary geopolitics as “Cold War 2.0” is increasingly giving way to comparisons with the strategic mistrust that preceded the World Wars. The question is not whether history is repeating itself, but which elements are similar and which are different this time. In an international system characterized by

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**Who Gained from
the NATO Ankara
Summit: An
Assessment**

Background On July
7–8, 2026, the two-
day NATO Summit in
Ankar

Context

The Russia-Ukraine war, the Iran-Israel conflict and intensifying US-China strategic competition have revived the importance of industrial capacity in warfare.

Facts

SIPRI Yearbook 2026 records the 11th consecutive year of growth in global military expenditure since 2015.

India's Draft Defence Acquisition Procedure (2026) shifts focus from “Made in India” to “Owned by India”, emphasising intellectual property and source-code ownership.

Analytical Crux

The article highlights a paradigm shift in warfare where industrial resilience has become as critical as technological superiority. Long wars demand sustained production of weapons, critical minerals & defence equipment, making supply chains a key strategic asset. China's dominance in rare-earth processing and manufacturing offers it significant geopolitical leverage. For India, genuine strategic autonomy will depend less on defence imports & more on indigenous innovation, ownership of defence technologies, resilient industrial ecosystems & the capacity to sustain production during prolonged conflicts.

Verbatim Quotes

"Supply chains have become a strategic terrain, while blurring of lines between the civilian & military domains."

- Purna Gandhi

From 1991, three foreign policy lessons for managing disruption

From 1991, three foreign policy lessons for managing disruption of certainties



RAJAMANDALA
BY C RAJA MOHAN

HISTORICAL ANALOGIES must be approached with caution. Yet there is a striking symmetry between the foreign policy challenges that confronted India in 1990-91 and those now posed by the wars in Iran and Ukraine. Simultaneous upheavals in the Middle East and Europe in 1991 shattered India's economic and strategic assumptions. Today, the two regions are again compelling Delhi to reconsider the foundations of its national strategy.

Iraq's invasion of Kuwait in August 1990, and the US-led war to reverse Saddam Hussein's annexation, sent oil prices soaring, disrupted remittances and aggravated India's balance-of-payments crisis. Within months, the Soviet Union — the principal anchor of Indian foreign policy during the Cold War — collapsed. The twin shocks forced India to reform its economy, diversify its international partnerships and rethink its place in the world.

The circumstances today are different, but the underlying challenge is familiar. The war that began with the killing of Iran's Supreme Leader on February 28 has raised energy costs, disrupted navigation through the Strait of Hormuz and exposed India's dependence on the Middle East.

The relief in Delhi after Washington and Tehran signed a memorandum of understanding in June has proved premature as the conflict escalates again. In Europe, meanwhile, the Ukraine war has entered its fifth year without a clear path to settlement. Russia is not about to disintegrate as the Soviet Union did in 1991. But the prolonged war, with its mounting costs, is generating new questions about Russia's future at home and abroad.

India is much better placed to manage these shocks than it was in 1991. It has a larger economy, greater diplomatic weight, and wider international partnerships. Yet its exposure to the world and the resulting vulnerabilities are greater.



ILLUSTRATION: C R SAKSHI

the provision of refuelling facilities to American military aircraft — reflected these multiple pressures.

But the domestic strategic consensus in 1991 was hardly realistic. Large sections of the political and foreign policy establishment sympathised instinctively with Saddam, long viewed as a friend of India and a representative of secular Arab nationalism. His annexation of an independent country was viewed as less important than his confrontation with the United States.

The same rigidity shaped Indian reactions to the Soviet crisis. By the late 1980s, Mikhail Gorbachev's internal reforms and retrenchment abroad had made clear that the old Soviet order was unsustainable. Yet a large section of Delhi's foreign policy community denounced him for seeking accommodation with the West. When communist hardliners attempted a coup in August 1991, there was barely concealed political glee in parts of Delhi. The coup collapsed within three days; the Soviet Union disappeared in December.

The protagonists have changed, but the instinct survives. Sympathy for Tehran often rests less on the character or conduct of the Islamic Republic than on its resistance to

Iraq's invasion of Kuwait in August 1990, and the US-led war to reverse Saddam Hussein's annexation, sent oil prices soaring, disrupted remittances and aggravated India's balance-of-payments crisis

America. Saddam's secular autocracy and Iran's Islamic theocracy are as different as chalk and cheese. Yet, the Indian foreign policy community embraced them both as symbols of anti-American defiance.

The debate on Russia is similarly personalised around Putin and sentimentalised through the memory of Soviet support for India. This obscures the need to examine Russia's internal strains, its changing relationship with China and its imperatives for reconciling with Europe and America. India's interests require an empathetic understanding of the domestic politics of Russia and Iran — not reflexive signalling of solidarity to the governments of the moment.

The first lesson from 1991, therefore, is that no balance of power is permanent. The certainties of the 1980s — a stable Soviet Union, a bipolar order and dependable partnerships — vanished with astonishing speed in 1991. Unpredictability is not an interruption of normal international politics; it is one of its permanent features. Indian strategy must devote as much attention to discontinuity as to continuity.

The second is that debate itself is a strategic asset. A foreign policy community organised around a rigid consensus will repeatedly miss inconvenient possibilities. India needs stronger expertise on Russia, Iran, Central Asia and the internal politics of the Middle East. India needs sustained investment, more than ever, in languages, history and regional specialisation. It also needs institutions willing to reflect on competing scenarios and encourage contrarian judgments.

The third and most important lesson is that external shocks and systemic changes cannot be managed by diplomacy alone. What rescued India after 1991 were the internal reforms. The answer must be the same today — sweeping domestic reform to cope with a changing world. Diplomacy's role then and now is to support internal transformation.

The writer is a contributing editor on international affairs for The Indian Express. He is also a Distinguished Professor at the Motwani-Jadava Institute of American Studies, Jindal Global University and the Korea Foundation Chair on Asian Geopolitics at the Council for Strategic and Defense Research, Delhi

Context

India's response to external crises should primarily be rooted in domestic resilience, economic reforms and strategic flexibility rather than diplomacy alone.

Facts

The 1990 Kuwait crisis & the collapse of Soviet Union triggered India's balance-of-payments crisis & the 1991 economic reforms.

3 lessons : No balance of power is permanent ; strategic debate is an asset ; diplomacy alone cannot manage systemic shocks.

Analytical Crux

The article argues that India's greatest strategic strength lies in domestic transformation rather than reactive diplomacy. Just as the 1991 crisis was ultimately overcome through structural economic reforms, today's geopolitical volatility requires stronger economic competitiveness, energy security, institutional capacity & informed strategic debate. Policy-makers must avoid rigid assumptions and remain adaptable to rapidly changing power equations. The central lesson is that resilient domestic capabilities provide the foundation upon which effective diplomacy & strategic autonomy can be sustained in an increasingly unpredictable international order.

Verbatim Quotes

“Unpredictability is not an interruption of normal international politics ; it is one of its permanent features.”

— C. Raja Mohan

India's 2028-29 UN Security Council campaign



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India's 2028-29 UN Security Council Campaign: Africa beyond Bilateral Goodwill

July 21, 2026 | IDSA Comments



Rajeesh Kumar

Research Fellow

Dr Rajeesh Kumar is a Research Fellow at the Institute....

Context

India has launched its campaign for a non-permanent seat on the UNSC for 2028-29. Its success will depend on sustained engagement with the African Union.

Facts

African Union has 54 members, making it the largest regional voting bloc in the UN GA.

India faces Tajikistan in a contested election, unlike its uncontested 2021-22 UNSC bid.

Analytical Crux

The article underscores that contemporary UN elections increasingly reward institutional coalition-building rather than diplomatic prestige alone. Africa's growing collective influence through the African Union makes continent-wide engagement indispensable for India's global ambitions. While India's development partnership with African countries remains a major strength, revitalising mechanisms such as the India-Africa Forum Summit and deepening engagement with AU institutions will be equally important. The UNSC campaign therefore represents not merely an electoral contest but a broader test of India's multilateral diplomacy & Global South leadership.

Verbatim Quotes

“Diplomatic reputation and bilateral partnerships remain important, but they no longer guarantee electoral success.”

— Dr. Rajesh Kumar

PSIR 2025, Paper II : *"Trump's return to the White House is a jolt to push the European Union to invest in its own defence and economic and technological revival." Comment.*

PSIR 2024, Paper II : *The changing global order and ongoing regional conflicts, with the global powers taking sides, have jeopardised the progress made towards disarmament in the past. Comment.*

PSIR 2025, Paper II : *India continues to invoke its time-tested policy of strategic autonomy vis-à-vis both the United States of America and Russia by rejecting US' offer of mediation on Kashmir issue and by refusing to criticize Russia in its ongoing war against Ukraine. Comment.*

PSIR 2025, Paper II : *Critically analyze the different phases of India's foreign policy since independence. How justified, do you think, is S. Jaishankar's classification of the current phase as the phase of 'energetic diplomacy'?*

PSIR 2025, Paper II : *Does the Non-Aligned Movement have any future in the wake of India's growing indifference towards it?*

PSIR 2024, Paper II : *"India must strive to become a semi-permanent member of the UNSC, rather than a permanent member without the right to veto." Comment.*

PSIR 2023, Paper II : *Discuss the importance of India's role in UN peacekeeping operations as a ground for its claim to a permanent seat in the UN Security Council.*



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