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DAILY BRIEF

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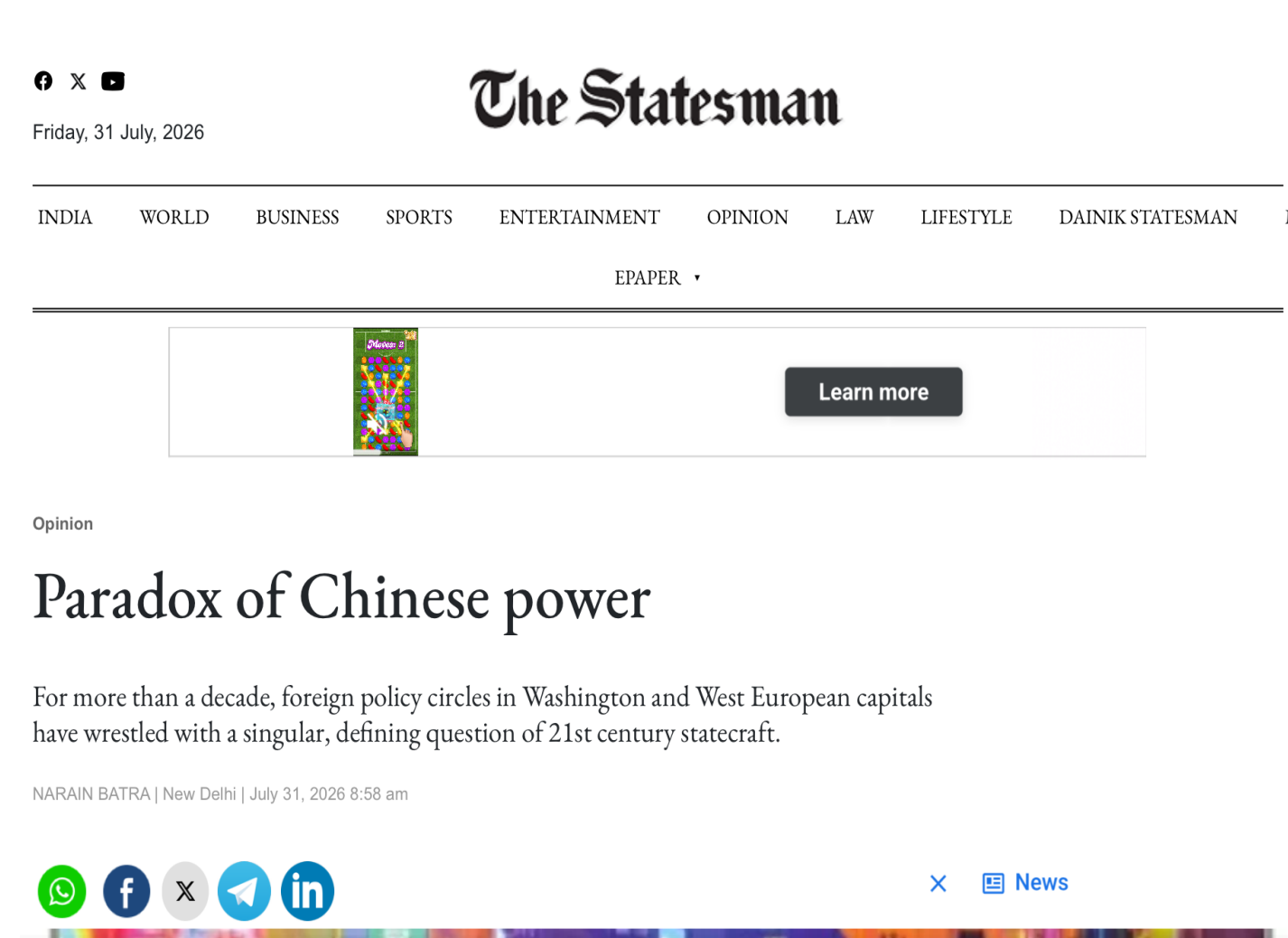
**From Balochistan to PoK:
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**The Bay of Bengal as
India's SHANTI anchor :
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The Paradox of Chinese power



Context

China's outward power & its inward financial rot are two ends of the same lever. Its global clout is partly produced by the weaknesses at home.

Facts

- China's slowdown is a systemic debt crisis decade in making, households can't absorb factory output.
- Domestic balance-sheet decay is squeezing Beijing's ability to fund the Belt and Road Initiative (BRI).
- China goods flooding world markets at state-subsidised prices : exports its overcapacity solar panels, EVs, legacy semiconductors & industrial goods.

Analytical Crux

Beijing won't let its own households consume, it has to dump the surplus on the world, and that dumping is exactly what buys it immediate leverage through supply-chain choke holds. The same tariffs, anti-dumping duties & "de-risking" push back & erode China's standing. China is a "potent but brittle" power i.e. dominant in the real economy, hollow in its balance sheet. The smart posture for both India and the US is calibration, not panic or complacency. The tech chokepoints, Quad and AUKUS, and a credible infrastructure alternative for the Global South.

Verbatim Quotes

"Beijing is neither a 10 foot tall economic giant immune to market forces nor a collapsing state on the brink of implosion. It is a potent, state directed industrial superpower built upon a fragile, debt-laden domestic economy."

- Narain Batra

From Balochistan to PoK: Pak is drifting towards Punjabistan



Pakistan has long imagined itself as the homeland of Muslims and a citadel of Islam. In practice, however, it could not go beyond being the nation of Punjabis. If these trends continue, Pakistan may end up becoming what it always believed itself to be — Punjabistan.

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Context

Pakistan's crises are no longer one-at-a-time as Balochistan, Khyber Pakhtunkhwa & Pakistan occupied Kashmir are simmering together due to structural flaw.

Facts

■ Economic collapse : rising electricity prices & slashed subsidies turned livelihood protests into demands for political rights.

■ Structural flaw : state captured by Punjab's elite, run under military's shadow, behaving less like a federation & more like a coloniser.

■ Pakistan's cohesion : rests on state & military authority unlike Iran, which rests on civilisational identity predating modern nation-state.

Analytical Crux

The distillation is that Pakistan's crisis has moved from episodic to structural. Underneath the insurgencies is a Punjab dominated, army-tutored state that treats its own provinces as colonies, so revolt from the periphery is built into the design. Pakistan keeps confusing tactical usefulness to a superpower (Nixon-era, Zia, Musharraf & now Trump) with strategic national strength. Pakistan has long imagined itself as the homeland of Muslims & a citadel of Islam. In practice, however, it could not go beyond being the nation of Punjabis. Even after nearly 8 decades of existence, Pakistan behaves less like a federation than a coloniser managing its frontiers.

Verbatim Quotes

"Pakistan often mistakes borrowed geopolitical relevance for permanent national power. Armies are trained to defeat enemies, not reconcile competing ideologies & identities."

- Utpal Kumar

The Bay of Bengal as India's SHANTI anchor

The Bay of Bengal as India's SHANTI anchor

The Bay of Bengal region, one of the world's most disaster-prone regions, lacks coordinated mechanisms to respond to natural disasters. Non-traditional threats such as climate-induced disasters, illegal fishing, cyber vulnerabilities, and supply chain disruptions require regional cooperation beyond bilateral aid or maritime power. This gap – growing capacity without shared norms – highlights the need for stronger maritime security.

On July 13, External Affairs Minister S. Jaishankar introduced Securing Holistic Advancement through Norms, Trust and Integrity (SHANTI) while launching India's candidature for the UN Security Council (UNSC) for the 2028-29 term. Building on Security and Growth for All in the Region (SAGAR) and Mutual and Holistic Advancement for Security and Growth Across Regions (MAHASAGAR), SHANTI provides a normative framework for shared maritime spaces, with the Bay of Bengal serving as the ideal region to operationalise it before expanding it across the wider Indo-Pacific.

The Bay's centrality

In recent years, the Bay of Bengal has moved from the margins to the centre of India's strategic thinking. Historically, it connected South and Southeast Asia through trade, culture, religion, and the exchange of ideas long before the Indo-Pacific entered diplomatic vocabulary.

Today, it links India's Act East policy with the Association of Southeast Asian Nations (ASEAN), provides access to the strategically vital Malacca Strait, and connects the eastern Indian Ocean to major global trade and energy routes. China's heavy reliance on the strait – often described as the "Malacca dilemma" – has driven its expanding regional presence through ports and infrastructure projects, intensifying geopolitical competition. As economic connectivity, maritime



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The Bay of Bengal is an ideal testing ground for SHANTI's security vision

governance, and strategic rivalry converge in the Bay, SHANTI offers a framework that places norms, trust, and integrity – not tonnage – as the currency of durable advantage.

A maritime security evolution

As such, SHANTI can be best understood as a logical evolution of its maritime outreach. SAGAR, articulated in 2015, supplied the vision of 'equity in development' and MAHASAGAR, announced in 2025, expanded that vision's scope recognising the interconnectedness of security (both vertically among nations and horizontally in threat perception) in the wider Indo-Pacific and the Global South. SHANTI offers the grammar of maritime security framework, the norms, trust and integrity in cooperation through which vision can be translated into tangible action that is well received and reciprocated. It shifts the emphasis from competition to demand driven cooperation, from influence to non-prescriptive institution-building, and from episodic crisis management to long-term resilience. This shift – from protecting maritime spaces to governing shared maritime commons – reflects India's new security mantra. If SAGAR was a statement of intent and MAHASAGAR a statement of reach, SHANTI is a statement of method to situate India as the "preferred security partner" and "first responder".

Because the Bay of Bengal is a single interconnected system, its cyclones, fish stocks, shipping lanes and pollution cross national boundaries almost by default, and its littoral states face remarkably similar challenges and concerns – disaster risk reduction and response, coastal erosion, fisheries management, port resilience, undersea cable protection and climate adaptation.

Unlike the western Indian Ocean, which is marked by active conflict, fragile economy and

contested spaces, the Bay of Bengal's strategic geography encourages cooperation. Yet, the region suffers less from a lack of institutions than from institutional fragmentation. What is missing is a common framework to align existing mechanisms. SHANTI fills this gap by providing principles to strengthen cooperation in maritime security, disaster response, the blue economy, and environmental resilience. India's geography gives it a natural convening role, but its centrality should rest on regional stewardship – not dominance – through trust-based, rules-based cooperation among states with shared challenges and opportunities.

Principles to practice

Taken together, these conditions make the Bay of Bengal India's most governable maritime sub-region – a natural laboratory where SHANTI can move from principle to practice before shaping wider cooperation across the Indian Ocean. This was reflected at the July 2026 BIMSTEC National Security Advisers' meeting in New Delhi, where member-states adopted common principles for maritime law enforcement and humanitarian assistance and disaster relief. BIMSTEC also agreed to hold its first joint maritime security exercise in the Bay, in November 2026, while a white shipping information-sharing agreement remains under discussion. These initiatives reflect the norm-building and trust-based cooperation that SHANTI seeks to promote. Its lasting contribution, therefore, will not be another acronym in India's maritime lexicon, but a redefinition of security – from deterrence to resilience, from rivalry to shared responsibility, and from crisis management to governance of the shared maritime commons.

The views expressed are personal

Context

The Bay of Bengal is the natural place to test SHANTI as a doctrine that makes norms, trust & cooperation, rather than sheer naval tonnage.

Facts

■ EAM S. Jaishankar introduced SHANTI on 13th July: Securing Holistic Advancement through Norms, Trust and Integrity.

■ SHANTI builds on two earlier frameworks: SAGAR in 2015, and MAHASAGAR in 2025.

■ The Bay of Bengal links India's Act East policy with ASEAN, gives access to Malacca Strait and connects the eastern Indian Ocean to global trade and energy routes.

Analytical Crux

SHANTI signals the shift from projecting maritime power to setting maritime norms. India wants influence measured in trust and rules, not warships. The 3 step ladder (SAGAR gave the vision, MAHASAGAR the reach, SHANTI the method), with the Bay of Bengal picked as the "natural laboratory" because its problems cross borders & its geography rewards cooperation rather than rivalry. This reframes security from deterrence to resilience and is directly usable on maritime security, the Indo-Pacific, and neighbourhood-first questions.

Verbatim Quotes

"If SAGAR was a statement of intent & MAHASAGAR a statement of reach, SHANTI is a statement of method."

"India's shift from deterrence to resilience, from rivalry to shared responsibility, and from crisis management to governance of the shared maritime commons"

-Rajeev Ranjan Chaturvedi & Raghvendra Kumar

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