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The broken nuclear umbrella

The Broken Nuclear Um...

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The Broken Nuclear Umbrella

What Comes After Extended Deterrence

JENNIFER LIND AND
DARYL G. PRESS

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DANIEL BENNEWORTH-GRAY

Context

America's promise to defend allies with its "nuclear umbrella" has turned into a bluff. Its allies like South Korea and Poland need new arrangements.

Facts

■ The 2025 US National Security strategy - policy aimed at core American interests.

■ South - Korea is the only non-nuclear country in world that owns ballistic missile submarines.

■ France and the UK are nuclear armed NATO states.

Analytical Crux

Extended deterrence was a bluff but it held because Cold War stakes were existential. Once wars became regional & Washington turned inward with "America first", the bluff lost its credibility. This is the reason why India never outsourced its security to anyone's umbrella and built its own credible minimum deterrent. However, US should manage allied proliferation i.e. nuclear sharing or backing an independent deterrent rather than resist it. The way forward is NATO's "one-Key" system i.e. only the US president can release the bombs into a "three-Key" system, with France and the UK each contributing about two dozen warheads.

Verbatim Quotes

"A security strategy based on a bluff will feel like a bargain until the moment it is challenged. The US needs to refashion deterrence strategies for the world not as it once was, but as it is." - Lind & Press

The Indo-Pacific is here to stay, with or without Washington

The Indo-Pacific is here to stay, with or without Washington



RAJA MANDALA
BY C RAJA MOHAN

JAPANESE PRIME Minister Sanae Takaichi's visit to India this week highlights one important fact — the Indo-Pacific as a geopolitical construct will live on. Whatever Washington's reasons are for restoring the name Pacific Command, the logic of the Indo-Pacific will continue to drive key regional actors like India and Japan.

Prime Minister Narendra Modi's visit later this month to Indonesia, Australia and New Zealand will reinforce the proposition. In sum, the Indo-Pacific will remain a critical theatre of India's national economic and security strategy.

It was the Trump administration that officially adopted the Indo-Pacific lexicon in 2017, during its first term. At the time, many in India's strategic community viewed the concept with deep suspicion. Was Washington trying to lure India into an anti-China alliance? Was this another attempt to compromise India's strategic autonomy? Today, the anxiety has simply reversed. If Washington no longer emphasises the Indo-Pacific, does it mean America is abandoning Asia? Is it preparing to build a condominium with China?

Both reactions overestimate Washington's power to define India's strategic environment. What they reveal is a self-generated anxiety in Indian strategic discourse that swings wildly between concerns about

American "entrapment" and fears of American "abandonment".

The Indo-Pacific construct, when it emerged in the early 2000s, reflected the changing distribution of economic and military power in Asia driven by China's rise and assertion. What Americans call that reality matters less than the fact that Beijing's neighbours have no option but to deal with it — with or without American support.

In any case, the Indo-Pacific was not an American invention. Its modern political articulation came from Japan. In August 2007, during his historic address to the Indian Parliament, the late Shinzo Abe spoke of the "Confluence of the Two Seas". His argument was both simple and profound: The destinies of the Indian and Pacific Oceans had become inseparable, and the democracies along their littorals needed to work together to preserve an open regional order.

For Abe, this was not diplomatic rhetoric. It reflected Japan's assessment that China's rise had fundamentally altered Asia's strategic balance. The old Cold War alliance system centred exclusively on northeast Asia would no longer suffice. Japan needed stronger partnerships with India, Australia, Southeast Asia and Europe while reinforcing its alliance with the United States. The Indo-Pacific became the organising principle for that broader strategy.

Nearly two decades later, Prime Minister Takaichi has become the principal custodian of Abe's vision. Rather than retreating in the face of Washington's change of emphasis, Tokyo has doubled down. Speaking at Vietnam National University in Hanoi in May, Takaichi unveiled an updated "Free and Open Indo-Pacific" strategy, reaffirming the concept's validity despite shifts in American policy. Her updated

framework places new emphasis on resilient supply chains, critical minerals, economic security, maritime cooperation and stronger partnerships across the region.

Japan's credibility rests not merely on its diplomacy but on the transformation underway at home. Under Takaichi, Tokyo has accelerated the most ambitious expansion of Japanese defence capabilities since World War II. Defence spending crossed the 2 per cent of GDP threshold ahead of schedule. Long-range strike capabilities — including Tomahawk cruise missiles and extended-range indigenous missiles — are being deployed. Japan is reorganising its maritime forces, expanding its space capabilities, strengthening defence-industrial cooperation with partners, and building new security networks with Australia, South Korea, the Philippines and India. Tokyo's message is clear: Preserving a stable Indo-Pacific requires Japan to become a stronger strategic actor in its own right, not merely a dependent ally of the US.

The outcomes from Takaichi's visit will reflect that strategy. Tokyo and Delhi are preparing a joint declaration on economic security that, according to Japanese officials, will register their shared opposition to economic coercion. The two sides are expected to identify priority sectors, from semiconductors and critical minerals to clean energy, and to commit to coordinating their response when coercion is used.

Ironically, perhaps the strongest validation of the Indo-Pacific idea comes from China itself. Beijing dismisses the Indo-Pacific as an artificial construct. Yet, its own policies increasingly integrate the two oceans into a single strategic theatre. Over the past two decades, China's dependence on Middle Eastern energy and African re-

sources has steadily grown.

Beijing has built overland economic corridors linking western China to the Indian Ocean, established its first overseas military base in Djibouti, maintained a continuous naval presence across the Indian Ocean and developed an expanding network of dual-use commercial facilities stretching from Southeast Asia to the east coast of Africa. Chinese strategy increasingly treats the Indian and Pacific Oceans as one connected maritime space — which is precisely the logic underlying the Indo-Pacific concept.

India recognised this transformation nearly a decade ago when it formally embraced the Indo-Pacific as the widening arena of its strategic interests. There is little reason to abandon that framework simply because Washington has altered its vocabulary.

Delhi need not become captive to American enthusiasm or American indifference.

The Indo-Pacific ultimately rests not on American terminology but on Asian geography and Asian power politics. As China expands simultaneously into the Pacific and the Indian Ocean, and as Japan emerges as an increasingly capable strategic actor, the integration of the two oceans will only deepen.

The Indo-Pacific, then, is a structural reality of Asian politics, not a shifting American narrative. India should focus on building its own capabilities and deepening partnerships with like-minded Indo-Pacific countries to strengthen the regional balance of power.

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Context Indo-Pacific

is a structural fact of Asian geopolitics driven by China's rise. It survives even if Washington drops the term.

Facts

In 2007, Shinzo Abe delivered the "Confluence of the Two Seas" address to the Indian Parliament.

China established 1st overseas military base in Djibouti linking western China to the Indian Ocean.

The Trump administration adopted - "Indo-Pacific" lexicon in 2017.

India and Japan - joint declaration on economic security opposition coercion.

Analytical Crux

The Indo-Pacific is a fact of Asian power distribution and not a slogan. The Indo-Pacific was not an American invention. Its modern political articulation came from Japan. "India's psychology depends on strategic discourse between fear of entrapment i.e. being dragged into an anti-China bloc & fear of abandonment i.e. America leaving Asia. **It overestimates US power to define India's environment.** India should follow strategic-autonomy logic i.e. build capability, deepen partnerships with Japan, Australia, ASEAN and don't outsource its nuclear power.

Verbatim Quotes

"The Indo-Pacific, then, is a structural reality of Asian politics, not a shifting American narrative. Delhi need not become captive to American enthusiasm or American indifference."

- C. Raja Mohan

India's Israel habit meets west asian realities

India's 'Israel habit' meets West Asian realities

When leaders make foreign policy decisions, each may appear reasonable in isolation. However, their cumulative impact can be strikingly different from what was originally intended. As Iranian President Masoud Pezeshkian invited Prime Minister Narendra Modi to the funeral of former Supreme Leader Ayatollah Ali Khamenei, India's deepening engagement with Israel perhaps falls into that category. What was once a mutually beneficial partnership between New Delhi and Tel Aviv seems to have become more of a habit than the product of serious strategic deliberation. Yet, sound policy cannot be guided by the momentum of habit, for habit and strategy often pull in opposite directions.

A reconfigured region

For one thing, it is important to acknowledge the gains from the partnership between India and Israel. India has received considerable military technology and know-how from Israel, as well as expertise in intelligence gathering derived from their extensive counter-insurgency experience. However, the more important question is not only what this relationship provides today, but also what it forecloses over time. Judged on those terms, the picture is not particularly encouraging.

West Asia has been undergoing one of its most intense geopolitical reconfigurations in years, and this one is different in scale. For the past decade, the region's regional arithmetic has rested on the assumption that Iran was a wounded, sanctions-strangled actor whose reach could be curtailed and ambitions contained. That assumption has now been tested and found wanting. American and Israeli military strikes on Iranian facilities have not produced the strategic calm that Tel Aviv had hoped for at the outset of this costly campaign. Iran responded with retaliatory missile and drone salvos and, more importantly, demonstrated that any blockade of the Strait of Hormuz could not be easily overcome by the rhetoric of carrier groups. Once again, the geography of energy has become the geography of coercion. The terms of the final agreement quietly confirm that Iran was not broken.

The last three months have made it clear that the United States-Iran confrontation is not a distant geopolitical contest for New Delhi. It has had a direct impact on India's economy. Most of India's oil imports pass through routes vulnerable to any prolonged conflict in the Gulf. Whenever the Strait of Hormuz becomes a flashpoint, the consequences are felt directly in Indian households. It is here that the strategic canvas becomes more complicated, with every diplomatic choice carrying economic consequences. Strategic flexibility requires shunning comfortable alignments.

Many strategic analysts have long believed that Washington's policy towards Israel is fixed and



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unchanging – a constant around which all regional policy revolves. That assumption now needs to be revised. The public differences between Washington and Tel Aviv, reflected in U.S. President Donald Trump's frequent outbursts against Israeli Prime Minister Benjamin Netanyahu, are no mere diplomatic squall. They appear to be genuine, notwithstanding Mr. Trump's well-known idiosyncrasies, because Washington's strategic calculus in West Asia has changed faster than expected.

The U.S. urgently needs offramps, while Mr. Netanyahu, whose political survival is bound up with escalation, has little interest in de-escalation without achieving his maximalist objectives. The friction becomes evident when the patron and the client are at odds, and the once-blank cheque starts to float.

Iran cannot be ignored

Thus, the perception of a shift towards Israel, reflected in Mr. Modi's unexpected visit to Tel Aviv (February 25-26, 2026) just before the U.S. and Israel launched their coordinated attack on Iran (February 28, 2026), becomes riskier when it is made more explicit, as it could place India on the wrong side of a regional reconfiguration that neither Israel nor any third party can control. While Mr. Modi's personal absence from Ayatollah Ali Khamenei's funeral is unsurprising, the choice of India's representatives is itself a deliberate signal. Pairing Minister of State for External Affairs Pabitra Margherita with Bihar Governor Lt. Gen. Syed Ata Hasnain (retired) – himself a soldier-scholar shaped by counter-insurgency experience – may be read as a calibrated posture of political reassurance, while also subtly reflecting India's religious pluralism.

In other words, it reflects a posture that has internalised the war's central lessons without yet being willing to say aloud that Tehran's coercive capacity, demonstrated through the Strait of Hormuz and the missile exchanges, cannot be managed through the optics of Tel Aviv alone. This choice conveys an important diplomatic message of reassurance to Iran, which has demonstrated that it remains a regional heavyweight.

Moreover, Iran is a civilisational state with deep-rooted political and ideological networks across Iraq, Lebanon, Syria, and Yemen, as well as the proven capacity to generate economic pressure that can bypass conventional military deterrence.

A nation that can dictate ceasefire terms to Mr. Trump after absorbing punitive strikes from the U.S. and Israel is not a nation that can be casually discounted. China also appears poised to expand its strategic and economic footprint in Iran, making it imperative for India to exercise greater caution. Greater alignment with Israel risks pushing Tehran further into the China-Pakistan strategic embrace.

There is also the matter of Europe, an underutilised and undervalued element in India's economic planning. India must recognise that Europe's political landscape has turned against Israel's actions in Gaza and Lebanon in ways, and at a pace, that would have been unimaginable two years ago.

More than sentiment, electoral arithmetic is at work. And electoral arithmetic often shapes trade policy and, eventually, the tone of bilateral negotiations. India's status-seeking desire to be seen as a responsible international actor, rather than merely a vast market, and its economic ambitions in Europe – including the operationalisation of the India-European Union Free Trade Agreement – may come under closer scrutiny in the context of its West Asia policy than New Delhi anticipates.

What is unusual about the present moment is that India has no option but to act strategically, independently, and decisively. It has leverage because it has maintained good relations with many Arab Gulf states, from which millions of Indian workers send remittances home. Although Saudi Arabia may once again have found tactical reasons to accommodate Rawalpindi (Pakistan), India's relationship with the United Arab Emirates has grown even stronger.

New Delhi's historical ties with Tehran, though constrained by shifting regional dynamics, have not been completely severed. More fundamentally, India's sheer size combined with its geostrategic attributes makes it an indispensable stakeholder in any emerging regional order. What India needs now is the political will to wield its leverage effectively in pursuit of clearly defined national objectives.

Beyond binary choices

India needs a sufficiently ambitious strategic imagination. But that does not mean choosing between Israel and Iran, for that would be far too simplistic, and history rarely rewards such simplifications. Herein lies the distinction between an adaptive, alignment-driven foreign policy – the kind that follows and adapts to alignments forged by others – and an architectonic foreign policy, which seeks to shape its own strategic environment.

For a country that claims to be 'vishwabandhu', it is important to recognise that the credibility of such a claim will be tested in moments such as these, when the world is watching India's words and actions. New Delhi's most valuable strategic asset in the coming multipolar decade is its authentic voice as a champion of the Global South, and every visible alignment with Israel in a conflict in which the Global South overwhelmingly sympathises with the Palestinians risks putting that precious capital in jeopardy. The defence technologies provided by Tel Aviv are undeniably valuable. But the strategic price of appearing aligned in a conflict that has reshaped West Asia is no less real.

Context

India's tilt

toward Israel has hardened from calculated strategy into mere habit.

It endangers India's standing as a voice of the Global South.

Facts

India takes military technology, know-how & intelligence gathering expertise from Israel.

India's oil lifeline runs through Hormuz – energy security is hostage to Gulf escalation.

The US – Israel relationship is not fixed – the "blank cheque" is fraying.

Analytical Crux

The distillation is that India's Israel tilt has become habit rather than strategy but it is dangerous when the region is being reconfigured. Iran is not broken; Hormuz is a coercion lever over India's oil. The cost of appearing aligned with Israel is reputational. It erodes India's most valuable asset i.e. its Global South voice, in a conflict where the Global South backs Palestine. The issue is the "alignment-driven" versus "architecture" foreign policy distinction. The solution moves beyond binary choices. It is not Israel versus Iran, but strategic flexibility that shapes India's own environment.

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