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The Indo-Pacific without the Indo - Strategic consequences



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The Indo-Pacific without the Indo: Strategic Consequences for India

July 03, 2026 | IDSA Comments



Priyanshu
Agarwal

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Context If US strategy no longer treats India as central to Asia, can the Indo-Pacific still hold together and what should India build instead.

Facts

Indo-Pacific coined by Gaurpreet Khumana in 2007 & given voice by Abers "Confluence of the Two Seas" in 2007.

US Indo-Pacific Command reverts to Pacific Command, dropping "Indo" after eight years.

The 2026 National Defence Strategy - "denial defence along the First Island Chain," leaves Indian Ocean out, and drops the Quad entirely.

Analytical Crux

The Indo-Pacific was an Indian idea before it became an U.S. strategy. The dropping of "Indo" signals a change in strategic theory, not a change of stationery. The right response is to keep banking the Quad's functional gains like maritime domain awareness, critical minerals, ICET. Building a western theatre i.e. the Indo-Mediterranean, through IMEC, I2U2 and the EU where India is the point of origin rather than a guest on someone else's map. But that structural centrality is only as real as the money, ships and diplomacy India actually commits. A navy with the smallest service budget cannot underwrite the maritime role India claims. The concern is that strategic autonomy has to be backed by capability, or it collapses into rhetoric.

Verbatim Quotes

"In the Pacific-centric vision now ascendant in Washington, India is a valued but peripheral partner whose contributions are welcome but not load-bearing."
-Priyanshu Agarwal

At 250, the US can still reinvent itself and the world

At 250, the US can still reinvent itself — and the world

AMERICA turns 250, much in Washington's current politics distracts Indian attention — Donald Trump's antics in capturing the historic moment for personal glory, his diplomatic style that breaks from protocol, disputes on tariffs and technology, America's new dalliance with the Pakistan army, and the anxiety in Delhi at the prospect of a US-China condominium in Asia. But major anniversaries demand a longer view. For Indians trying to understand the future of the US, the more important story lies beneath the unending political noise from Washington: The repeated reinvention of American capitalism. That process has shaped not only America's domestic evolution but also the international order it has led for much of the past century.

In reflecting on the American revolution, we must also consider the other, intellectual revolution that occurred in 1776. While Britain's 13 North American colonies proclaimed their independence, Adam Smith published *The Wealth of Nations*, which laid the intellectual foundations of modern capitalism. Over the next 250 years, the two evolved together. America's greatest contribution to the modern world has not only been its leadership of capitalist development, but also its extraordinary capacity to reinvent it. Every reinvention transformed the nature of production at home, reconfigured US politics, and restructured the international system.

In the 19th century, factories, railroads and mechanised production transformed an agrarian republic into the world's leading industrial economy. Capital, machines and labour were brought together on an unprecedented scale. Productivity soared, cities expanded, and American industry became the foundation of national power.

The second reinvention arrived in the early 20th century with Frederick Winslow Taylor's scientific management and Henry Ford's moving assembly line reorganising work itself. Charlie Chaplin captured both the brilliance and the absurdity of this new industrial order in *Modern Times*. His unforgettable image of a worker swallowed by the assembly line remains one of the sharpest commentaries on modern capitalism. Fordism produced mass prosperity, but it also demanded that human beings adapt themselves to the rhythm of machines.

The third reinvention took American capitalism beyond US shores. Advances in container shipping, telecommunications and information technology allowed production to be fragmented across national borders and distant continents. American firms increasingly specialised in technological innovation, finance, branding and design while manufacturing shifted to lower-cost locations across Asia. The resulting global value chains defined a new era of capitalism. They also transformed China into the world's manufacturing powerhouse, even as American companies retained control over many of the technologies, finance and intellectual property that governed the system.

Today, America is embarking on a fourth reinvention — techno-capitalism. AI, advanced semiconductors, cloud computing, biotechnology and humanoid robotics are converging to create a new production system. The ambition is no longer to make workers more productive. It is increasingly to reduce dependence on human labour itself. Anthropic's Claude AI and Tesla's Optimus humanoid robot have become the most visible symbols of this transformation, but they



C RAJA MOHAN

represent a much broader technological ecosystem. Combined with recursive self-improvement, the emerging AI systems promise to reshape manufacturing, logistics, healthcare, and many other sectors. With proclamations that Artificial General Intelligence (AGI) and Artificial Super Intelligence (ASI) are not far away, the future could be here much faster than many imagine.

The new technologies change the very character of capitalism. Industrial capitalism depended on moving production to where labour was cheapest. Techno-capitalism depends increasingly on algorithms, computing power, data and intelligent machines. It also involves building massive new infrastructure within the US. Wealth now flows less from employing large and cheap workforces than from owning the technologies that can substitute for them.

Left-wing historians in the US have argued that technological revolutions do not merely transform capitalism; they are shaped by capitalism itself. That insight is especially relevant today. The age of AI will not simply produce new technologies. It is intensifying already heavy concentrations of economic power. Political institutions are nowhere near limiting their reach and power.

But efforts are on, if at a nascent stage. Every reinvention of capitalism has eventually produced a recasting of politics. The rise of giant industrial trusts produced the "progressive era" and antitrust legislation at the turn of the 20th century. The Great Depression produced the New Deal and a new social compact between capital and labour. The digital revolution has revived concerns over monopoly and market concentra-

tion. If Lina Maliha Khan led the legal battle against tech platforms as the chair of the Federal Trade Commission under the Biden Administration, sections of the MAGA movement are now revolting against the excessive adoption of AI.

AI and robotics are reopening familiar questions in unfamiliar forms: Who owns the machines, who captures the enormous productivity they generate, how should that new wealth be distributed, and what obligations does capital owe to society? The answers will shape the future of the American republic and rebalance the relationship between innovation, capital and society. The consequences of techno-capitalism will not stop at America's shores. Every previous iteration of American capitalism has reshaped the international system. Industrial capitalism in a massive continental state made the US a superpower. Fordism underpinned its global leadership after World War II. Globalisation spread American capital, technology and finance across the world. Techno-capitalism promises another global reordering — by redistributing economic and military power and transforming global institutions.

The US at 250 is deeply divided at home and at odds with itself. The rise of Trump is indeed the visible manifestation of it. But American history cautions us against writing off a republic that has repeatedly reinvented both its capitalism and the politics needed to govern it at home and lead it abroad. The age of AI is unlikely to be different.

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The consequences of techno-capitalism will not stop at America's shores. Every previous iteration of American capitalism has reshaped the international system

Context As US marks 20 years, the country's deepest strength is its repeated reinvention of capitalism and the newest "techno-capitalism" will reshape the global order gain.

Facts

America's reinvention of capitalism: from industrial to Fordist, globalised value chains to techno-capitalism.

Every reinvention reshaped the international system from US a superpower to global reordering.

1776 was double revolution: political independence of colonies and Adam Smith published *The Wealth of Nations* on modern capitalism.

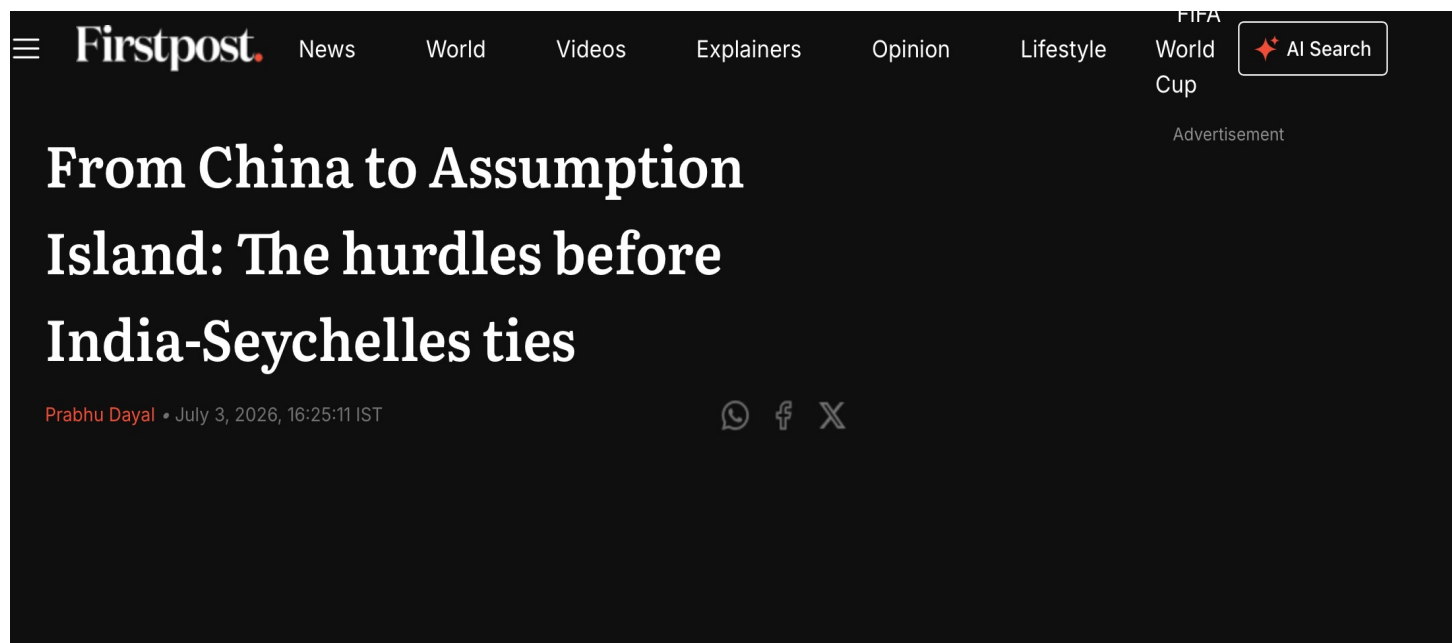
Analytical Crux

America's edge is no single technology but its habit of reinventing capitalism. Each reinvention has rewired both US domestic politics and the international order. Techno-capitalism is a qualitative break and AI and robotics aim to substitute the cheap labour. This concentrates economic power faster than politics can respond. But history says every such concentration eventually meets a political correction, and the FTC's antitrust push & the MAGA backlash on AI suggest the pattern may repeat. For India, the lesson is that the next reordering of global power will turn less on military balances and more on who controls AI, semiconductors and data. The ambition is no longer to make workers more productive. It is increasingly to reduce dependence on human labour itself.

Verbatim Quotes

“Industrial capitalism depended on labour. Globalised capitalism depended on moving production to where labour was cheapest. Techno-capitalism depends increasingly on algorithms.”

From China to assumption island



Context

Modi's visit for Seychelles 50th Independence Day shows India's Indian Ocean strategy runs on trust and capacity-building rather than military footprints.

Despite these challenges, the bilateral relationship remains highly resilient. India continues to support Seychelles successfully through alternative, demand-driven partnerships rather than heavy-handed strategic acquisitions

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Facts

■ Seychelles - an archipelago of 115 islands, smallest & least populated sovereign country in Africa.

■ India - Seychelles defence since 1976 joint maritime security, anti-piracy and countering regional threats.

■ Seychelles became 6th member of Colombo Security Conclave (CSC) in 2025.

Analytical Crux

India's Seychelles relations show that in the Indian Ocean, trust based, demand driven partnerships outlast basing ambitions. India has pivoted from acquiring bases to delivering capability and public goods and positioning itself as a "net security provider" under SAGAR and MAHASAGAR rather than a base-seeking power. This development first model is India's answer to China's chequebook diplomacy and BRI footprint. The unresolved tension is that small states like Seychelles will keep hedging between India and China to maximise leverage, while India's transfers are limited by the island's thin administrative capacity and by non-traditional threats. India's Indian Ocean strategy is moving from "footprint" to "trust and capacity" i.e. resilience over acquisition.

Verbatim Quotes

"By emphasising development partnerships and regional stability rather than formal military bases, India and Seychelles are building trust based alliance in Indian Ocean."

PSIR PAPER II, 2025: India maintains strong ties with countries that will assure a free and open Indo-Pacific and guarantee greater connectivity with rest of the world. Analyze.

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