

THE
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**CHURNING
OF GLOBAL
ORDER**

IN FOCUS

THE COLLAPSE OF ASSAD'S
ERA IN SYRIA

COVER STORY

WHAT'S NEXT FOR BRICS?

WAR STRATEGY

US NAVY'S ESB SHIPS REDEFINE
POWER DYNAMICS

TNJ'S POWER PANEL



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|| FOREWORD



THE DYNAMICS OF GLOBALISATION AND THE GLOBAL ORDER

The global order represents a unique dynamism born out of the need to constantly reinvent itself in consonance with the aspirations of a rapidly changing world. It is today visibly evident that reality is the special flavour of the emerging global order. This change is driven by four interlinked factors; multi-faceted global developments dramatically altering the cut and thrust of geopolitics; fast-paced technological innovations; rapidly altering political equations among key players on the global stage; and the global economy facing unexpected twists and turns.

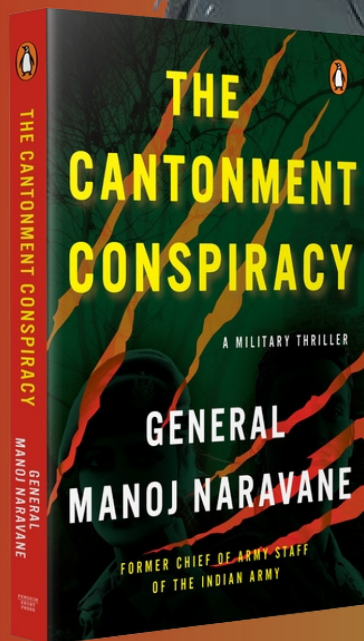
Each of these four factors has its distinct implications and when seen in concert they trigger off a wide range of mind-boggling consequences. The results of key elections (in the United States and Germany as two examples) have the potential to cause major shifts in power equations and geopolitics. Technology and its attendant innovations alter in irreversible ways the way information is disseminated and knowledge is constructed. Changing political equations within and between nations requires the re-calibrating of power equations. The global economy is often swayed by seemingly minor aberrations and realignment of economic equations at an amazingly swift pace.

The Vishnu Purana refers to the `Samudra Manthana` the churning of the sea. This was seen as the tussle between good and evil and the ultimate victory of good after a long process of churning. In important ways, the churning of the global order represents this fight between competing narratives and alternative strategies. The victory of one narrative/ strategy gives rise to a new equilibrium which over time leads to the emergence of a new competitive narrative. The churning of the global order is a quest for a search for a new equilibrium that reflects the impact of these linked global factors. The current edition of The News Analytics Journal takes a deep dive into this multifaceted dynamism and presents an understanding of this global flux.

Dr Sandeep Shastri, former
Vice Chancellor JLU and
current Vice President
NITTE Education Trust)



General Manoj Naravane



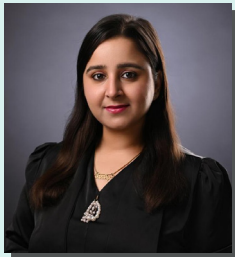
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Two officers fresh out of the National Defence Academy (NDA) get posted at a laid-back military garrison on the banks of the Ganga River in Western UP. Lieutenant Rohit Verma comes from an army background, knows the ropes and generally has it easy. Lieutenant Renuka Khatri, on the other hand, is from a civilian background, and from the first batch of girl cadets admitted to the NDA.

General Manoj Mukund Naravane (retd) served as the twenty-eighth chief of the army staff of the Indian Army from 31 December 2019 to 30 April 2022. He is an alumnus of the National Defence Academy, Khadakwasla (Pune); the Indian Military Academy, Dehradun; the Defence Services Staff College, Wellington; and the Army War College, Mhow, where he was also on the faculty.



EDITOR'S NOTE



A NEW ERA OF UNCERTAINTY

The world is undergoing a profound transformation, with long-standing alliances, economic systems, and geopolitical norms in flux. At the center of this shift is the legacy of Donald Trump, a polarising

figure whose impact on global affairs remains far-reaching. His 'America First' doctrine challenged multilateralism, disrupted trade and emboldened nationalist movements, leaving a lasting imprint on international relations.

One major consequence has been the fracturing of Western unity. Trump's skepticism toward NATO and the EU raised doubts about U.S. commitments, prompting European nations to explore strategic autonomy. While the Biden administration has attempted to restore alliances, divisions over defence, energy and engagement with rising powers like China persist.

The U.S.-China rivalry, heightened by Trump's aggressive trade policies, has further reshaped global dynamics. His administration's shift from economic cooperation to strategic competition set a precedent that continues today, with intensified technological decoupling and security-driven policies. This fragmentation has forced nations to rethink supply chains and economic alignments. Trump's success has also fuelled nationalist and populist movements in Europe, influencing leaders who champion protectionism and anti-globalist rhetoric. This ideological shift has complicated global cooperation on critical issues like climate change and security.

His conflicting priorities will greatly challenge the policymakers in India. On one hand, his emphasis on countering China through partnerships, such as the Quad, while threatening a 100% tariff on BRICS will increase geopolitical complexities for New Delhi as a key stakeholder in both the grouping. India will also be a keen watcher on the outcome of the likely Trump-Putin summit leading to the resolution of the long-drawn Ukraine war.

The current edition of The News Analytics Journal brings the ringside view and analysis of all these complexities. As the world navigates this ongoing transformation, adaptability will be key to shaping a more stable international order—or preventing further fragmentation.

Jai Hind!

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THE COLLAPSE OF ASSAD'S ERA IN SYRIA

IN FOCUS

The Assad regime's grip on Syria, marked by decades of authoritarianism and repression, has faced unprecedented challenges since the Syrian Civil War's outbreak in 2011. With internal discontent, economic collapse, and international isolation, the collapse of Assad's era signals a transformative yet uncertain chapter for Syria's future. This article explores the historical context, the causes of the regime's decline, and the implications of a post-Assad Syria with Zakaria El-Ghoul from Beirut- Attorney at Law – PHD Modern History.



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The reign of the Assad family over Syria, which began in 1971 with Hafez al-Assad and was succeeded by his son Bashar al-Assad in 2000, has been marked by authoritarian rule, political repression, and a complex web of alliances. Bashar al-Assad's regime, in particular, has faced unprecedented challenges since the outbreak of the Syrian Civil War in 2011. The conflict, which has caused immense suffering and displacement, has also eroded the pillars of Assad's power, signalling the potential collapse of his era.

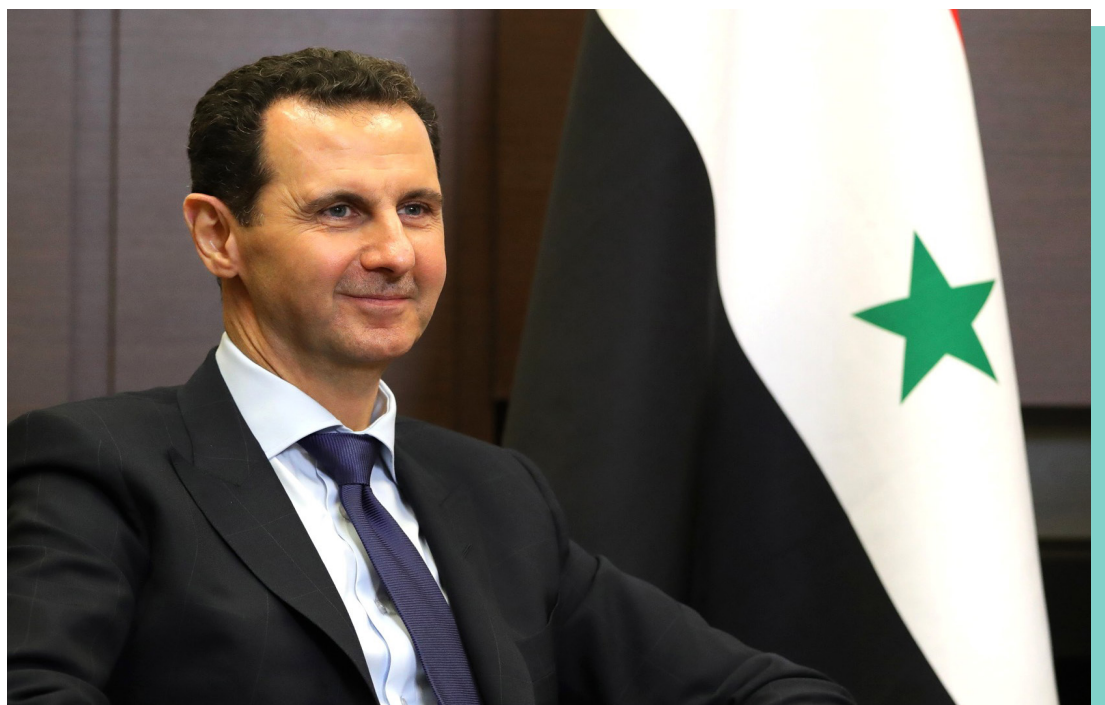
Hafez al-Assad established a centralized, authoritarian state built on the pillars of the Ba'ath Party, the military, and an extensive security apparatus. His regime emphasized secularism, Arab nationalism, and socialist policies, but it also relied heavily on patronage networks and sectarian favouritism, particularly benefiting the Alawite minority to which the Assad family belongs.

When Bashar al-Assad inherited power in 2000, many Syrians hoped for reform and modernization. However, his rule quickly revealed continuity with his

father's policies, prioritizing regime survival over genuine political change. The government suppressed dissent, marginalized opposition groups, and maintained a tight grip on the economy and media.

THE SYRIAN UPRISING

The Arab Spring of 2011 ignited a wave of protests across the Middle East, including in Syria. What began as peaceful demonstrations demanding political reform and greater



freedoms quickly escalated into a full-blown civil war due to the regime's brutal crackdown. Assad's forces used excessive violence, including torture, mass arrests, and indiscriminate bombings, to suppress dissent.

The uprising revealed deep-seated grievances within Syrian society, including economic inequality, corruption, and sectarian divisions. The Assad regime's reliance on Alawite elites and its alienation of Sunni-majority populations further exacerbated tensions, fuelling the opposition's resolve to topple the government.

unemployment, and poverty. By the mid-2020s, the Syrian pound had lost much of its value, and necessities became inaccessible for most Syrians. The economic crisis undermined the regime's ability to sustain its patronage networks, a cornerstone of Assad's power.

International Isolation- Assad's regime faced widespread condemnation from the international community. Western nations imposed sanctions and supported opposition forces, while regional powers like Turkey, Saudi Arabia, and Qatar backed various rebel groups. Although Assad retained the



Decades of centralised authoritarianism have left Syria without strong civil institutions, making governance and reconstruction a critical challenge in any post-Assad political framework.

FALL OF THE DYNASTY

Loss of Territorial Control- By 2012, the Syrian opposition, composed of defected soldiers, Islamist groups, and local militias, had gained control of significant territories. The rise of the Free Syrian Army (FSA) and later extremist groups like ISIS further fragmented the country. Assad's forces were unable to maintain control over large swathes of Syria, losing key cities and regions to various factions.

Economic Collapse- The war devastated Syria's economy. Infrastructure destruction, sanctions, and the loss of oil-rich regions contributed to hyperinflation, widespread

support of key allies like Russia and Iran, this reliance exposed the regime's vulnerabilities and dependence on foreign powers.

Sectarianism and Fragmentation- The regime's strategy of portraying itself as a defender of minorities against Sunni extremism deepened sectarian divisions. This narrative alienated large segments of the Sunni population, while the regime's reliance on militias and foreign fighters, such as Hezbollah, further fragmented the country.

Humanitarian Catastrophe- The war caused one of the worst

humanitarian crises of the 21st century. Over 500,000 people were killed, and millions were displaced internally or fled as refugees. The regime's use of chemical weapons, barrel bombs, and sieges against civilian populations eroded its legitimacy and turned many Syrians against Assad.

THE ROLE OF FOREIGN ACTORS

Foreign intervention has been a double-edged sword for the Assad regime. While Russia and Iran provided critical military and financial support, their involvement also highlighted Assad's dependence on external actors.

Moscow's military intervention in 2015 helped Assad regain control of key territories, including Aleppo and Damascus. However, Russia's influence over Syrian politics has grown, limiting Assad's autonomy.

Tehran's support, including funding, arms, and fighters from

operations in northern Syria have challenged Assad's authority. Meanwhile, the U.S.-led coalition focused on defeating ISIS but also indirectly weakened the regime by supporting Kurdish-led forces in the northeast.

SIGNS OF A CRUMBLING REGIME

Despite Russian and Iranian support, the Syrian military has been severely weakened. Desertions, casualties, and reliance on foreign militias have eroded its effectiveness. Even in government-controlled areas, protests and strikes have erupted over deteriorating living conditions and corruption. The regime's inability to address basic needs has led to growing disillusionment among its supporters.

Reports of infighting among regime elites, including members of the Assad family, suggest cracks within the ruling class. Economic hardships and international sanctions have also strained the loyalty of business elites who once



groups like Hezbollah, bolstered Assad's forces. However, Iran's presence has fuelled resentment among Syrians who view it as an occupier.

Turkey's support for opposition forces and its military

benefited from the regime's patronage. While Russia and Iran continue to back Assad, their priorities may shift as they face their own domestic and international challenges. A potential reduction in foreign support could leave the regime vulnerable to renewed opposition offensives.

Deepening sectarian divides and economic instability have eroded Assad's legitimacy, while international isolation and reliance on foreign allies reveal the regime's vulnerability.



WHAT COMES AFTER ASSAD?

The collapse of Assad's era has marked a turning point in Syria's history, but it also raises critical questions about the country's future. Syria's deep divisions and the proliferation of armed groups make the prospect of a unified post-Assad state uncertain. Without a clear plan for reconciliation and governance, the country could descend into further chaos.

A post-Assad transition would require significant international support for reconstruction, governance, and reconciliation. However, geopolitical rivalries among foreign powers could hinder efforts to stabilize Syria. The collapse of the Assad regime has opened the door for accountability for war crimes and human rights abuses. Establishing justice mechanisms would be essential for rebuilding trust and achieving lasting peace.

Even after the collapse of Assad's era in Syria internal and external pressures for gaining influence with the new

dispensation continues. However, the end of Assad's rule is unlikely to bring immediate stability. The challenges of rebuilding a war-torn country, addressing deep-seated grievances, and reconciling divided communities will require sustained efforts from Syrians and the international community alike.

The lessons of Syria's tragedy underscore the dangers of authoritarianism, sectarianism, and unchecked power. As the Assad regime tumbles, the world must prepare for the complex task of supporting a transition toward a more inclusive, just, and peaceful Syria.

*(Nadia Hallak, senior correspondent and distinguished journalist from Beirut, Lebanon. She has extensively worked in the Arab region and covers major developments in the Arab world for TNJ. The views expressed by the author and any guest experts do not necessarily reflect the views of **The News Analytics Journal.**)*

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WHAT'S NEXT FOR BRICS?

COVER STORY

BRICS has evolved from an economic grouping into a geopolitical force, challenging the West's dominance in global governance. With expanding membership and aspirations for a multipolar world, BRICS countries advocate for economic sovereignty and alternatives to Western-led institutions. However, internal differences, geopolitical rivalries and U.S. opposition pose significant hurdles. As the bloc gains traction, its ability to reshape global power structures remains a question of ambition versus practical execution.



AMBASSADOR DR. DEEPAK VOHRA, IFS (RETD)
FOR TNJ

The acronym is attractive – BRICS. The statistics are equally absorbing. BRICS (Brazil, Russia, India, China, and South Africa) is a 25 (percentage of world exports), 35 (percentage of world area), 45 (percentage of global population), 65 (percentage of global GDP) organization. Its combined GDP of over USD 60 trillion exceeds that of G-7.

So many countries wish to join a group that expostulates an alternative equitable world order free of domination by a small group and rejects the Western narrative that the global

ideological conflict is between democracies and autocracies and the former must win at all costs (the Bilderberg ideology to support free market Western capitalism and its interests around the world)

THE RISE OF BRICS

When the Second World War ended, the international political and financial architecture designed to be developed-dominant and developing-dependent rackets like the United Nations, IMF and World Bank were created



to perpetuate this system. By the turn of the century, the developing nations, with a few exceptions, realized that they were still where they were when decolonization gave them political independence in the 1960s-1970s. They began to look for a new paradigm. Along came BRICS. It was meant to adumbrate a new distribution of global power, an alternative to the western-dominated Bretton Woods system, but, sadly, the differences between the BRICS nations far outweigh their commonalities.

And the new American President Donald Trump knows this. Many of the members, especially China, disagree on fundamental factors, such as transparency. Someone floated the idea of a BRICS currency to challenge the dollar (since

accounting for 40% of global GDP of USD 104 trillion (as against under a third for the G7 nations).

Following the 2024 inclusion of Egypt, Ethiopia, Iran, and the UAE, in January 2025, when its President was the Chief Guest at India's Republic Day parade, Indonesia became the first Southeast Asian nation to join the BRICS partnership. The membership of Southeast Asia's largest resource-rich and most populous country (270 million) adds to the appeal of BRICS for developing nations as an alternative to Western-dominated global institutions. Yet Indonesia remains committed to equilibrium through multi-alignment, with a parallel application to the organization for Economic Co-operation and Development.



the Euro has become an adjunct to the US money). Trump threatened to slap 100% trade tariff on BRICS countries, if they moved towards a new BRICS currency. Net result – the idea has been buried quietly. India has clarified that it is not challenging the dollar.

CAN BRICS STAY UNITED?

The main stated goals of BRICS are cooperation, development, and influence in international affairs through political coordination, social & cultural exchanges, technology & innovation, sustainable development, peace and security. Four of the five BRICS member nations are among the top ten economies in the world – China, India, Russia, Brazil –

The narrative of BRICS as a champion of South-South cooperation is hazy, as China and Russia are hardly Global South countries.

GLOBAL PERSPECTIVE ON BRICS

While some countries want Argentina "in", an unabashed American acolyte, pro-US, pro-Israel, pro-Wall Street, anti-socialism, anti-China, anti-Russia and anti-Iran others said thank you but no thank you. BRICS will not miss Argentina, but the withdrawal was a flashing red signal that Buenos Aires did not wish to get involved with what was being touted as an anti-Western movement. Argentina needs the support of the US, IMF, and Wall Street desperately for its President's

Despite the economic potential, BRICS struggles with internal divisions. India and China remain at odds, and new members like Indonesia and Iran bring diverse, often conflicting, strategic priorities.

far-right neo-liberalistic policies to get Argentina out of its crisis. He cannot be on the wrong side by being in BRICS if it is seen to challenge the Western financial system.

Bill Clinton's US Presidential campaign in the mid-1990s had a catchphrase: "It's the economy, stupid". The new fellow in the White House in 2025 might be a geopolitical arsonist but he is clear about restoring America to its pre-eminent global position – economically, diplomatically, militarily. He is angry at BRICS's ambition to create a new BRICS currency for trading among members that may undermine the US dollar's dominance of international trade. He has threatened a 100% tariff on BRICS members over such initiatives, making the realisation of the grouping's currency unrealistic.

"If Turkey does anything that I, in my great and unmatched wisdom, consider to be off limits, I will destroy and obliterate the economy of Turkey (I've done before!)"

And in January 2025, when Mexico and Colombia sought to hamper America's efforts to expel their citizens illegally residing in the US, Trump's imposition of huge sanctions shut them up faster than you can say "Trump"!

If more and more nations join the BRICS movement it might become a contender for global economic leadership instead of G7, but too many moving parts in a high-performance engine could make it sputter. Integrating diverse economies is never easy, especially when there is little bilateral political



Any unified currency, backed by national currencies, oil or gold, would require global acceptance and economic stability, and aligning policies across diverse economies through unprecedented coordination and execution. The idea of a multipolar world economic order is seductive, especially for the 26 countries with about 1/3 of the world's population facing US sanctions.

Despite envy, the world is aware of the power of the American dollar. During the two World Wars, the Allies paid for US supplies with gold. Making the US the largest holder of gold, and as of date two-thirds of allocated foreign bank reserves are denominated in U.S. dollars. The 1944 Bretton Woods conference agreed that the world's currencies would be pegged to the U.S. dollar.

In 2019, when Turkey sought to mess around with America's Kurdish friends in northeastern Syria, Donald Trump tweeted:

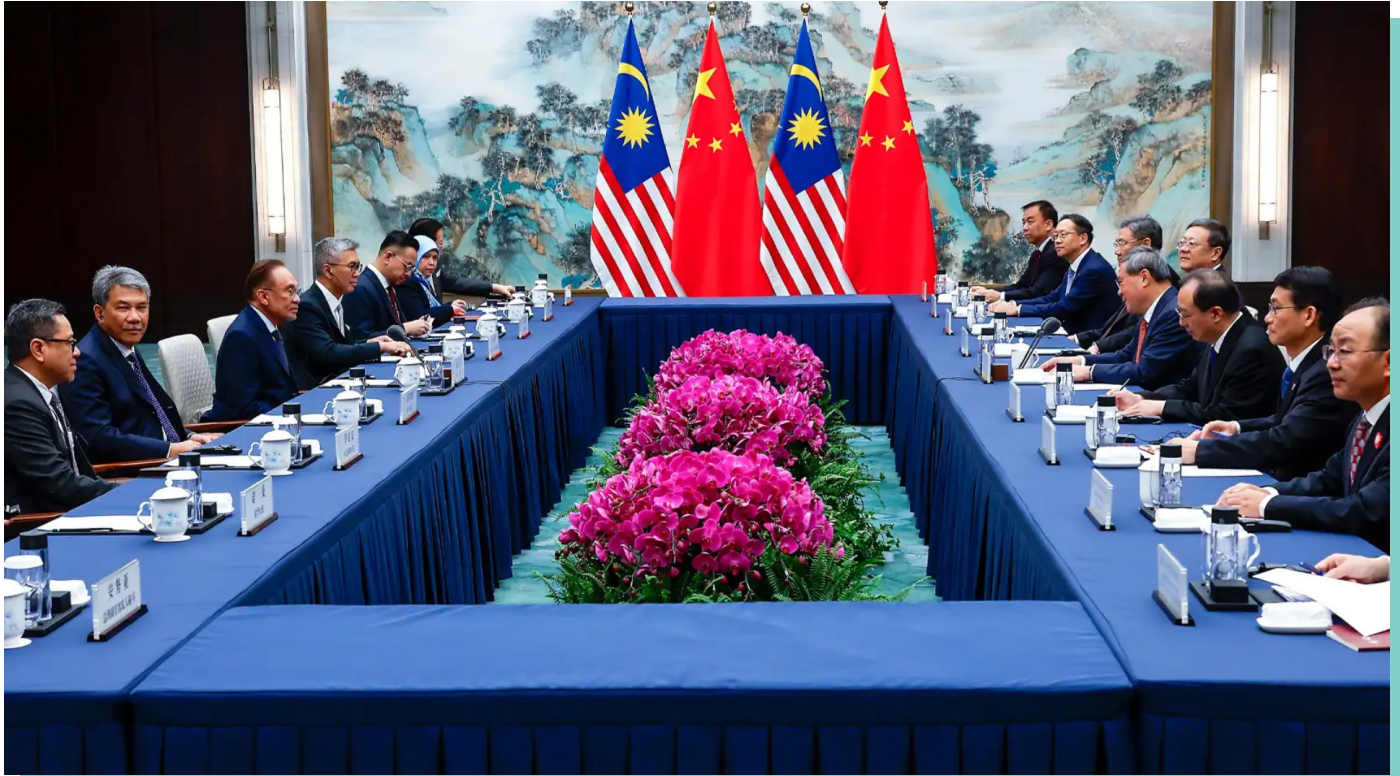
trust between several of its adherents. Despite the Europeaness of its members, the European Union is facing severe headwinds as their economies slow, with Brussels prescribing a one-pill cures-all panacea. Britain quit several years ago.

Is BRICS a challenge to G7 for control of the global marketplace? Not quite yet BRICS wants more say in the global political order and institutions such as the United Nations. Interestingly, only two BRICS members have permanent seats in the United Nations Security Council. One of them, China, is accused of subverting the UN system (including the IMF and World Bank) and blocking its reform. Two other BRICS members India and Brazil seek permanent UNSC seats, but little progress has been made owing to geopolitical considerations. Despite all the polite noises, none of the P-5 wants to allow others at the high table.

When Prime Minister Narendra Modi shared the stage at the October 2024 BRICS summit in Kazan, Russia with Russian President Vladimir Putin and Chinese President Xi Jinping, the Masters of the Universe were upset. The presence of new BRICS members Iran, Egypt, the UAE, and Ethiopia upset them even more. All founder members were present except Brazil whose President claimed injury.

key drivers of global economic growth, and unless there are strong headwinds, will continue to generate the largest share of global GDP growth in the future.

Turkiye, with one of the largest militaries in NATO, wants to join BRICS. It has dumped the European Union. Maverick European nation France officially sought an invitation to the



Turkiye is the only NATO member that has applied to join BRICS. The UN Secretary-General also showed up in Kazan, probably thinking that the UN was dying and BRICS was an alternative to the existing unequal exploitative international system. This made Volodymyr Zelenskyy crazy, who almost threatened sanctions on the United Nations.

2023 BRICS Summit in South Africa. The rich nations of G7 believe they have a God-given mandate to determine the destiny of our planet. But when the financial meltdown occurred in 2008, they looked upto oil rich nations (Saudi Arabia, UAE, Brazil) and big economies of Aisa (China & India) in – the G 20 - to fix the world.

The U.S. and its allies view BRICS suspiciously, leveraging financial institutions and sanctions to curb its expansion. Washington's economic coercion aims to prevent any challenge to dollar supremacy.

WHAT LIES AHEAD FOR BRICS?

Although BRICS is seen as the foremost geopolitical rival to the G7 bloc of advanced economies, implementing competing initiatives such as the New Development Bank, the BRICS Contingent Reserve Arrangement, the BRICS Pay, the BRICS Joint Statistical Publication, and the BRICS basket reserve currency, nothing has challenged US economic dominance. Not too long ago, at least four BRICS members (India, Indonesia, Brazil, and South Africa) were referred to as the “fragile five” emerging markets, dependent on hot money flows. BRICS countries have indeed become

Realizing that the developed world needed them, the developing nations moved away from the shadow of the West and so BRICS was reinvigorated, becoming the revolutionaries for a more equitable international system. Can BRICS call Western arrogance to account? The jury is still out on that one.

*(Ambassador Deepak Vohra, IFS (R) is a former Ambassador to Armenia, Sudan and Poland. He was also a special Advisor to the Government of South Sudan. The views expressed are of the author and do not necessarily reflect the views of **The News Analytics Journal**.)*

GLOBAL INFLUENCER

LIANG WENFENG: THE AI VISIONARY

TNJ | Special Coverage

Liang Wenfeng, the 39-year-old founder of DeepSeek, has emerged as one of the most influential figures in the global artificial intelligence (AI) landscape. His meteoric rise, marked by groundbreaking innovations and bold strategic decisions, has not only redefined AI's possibilities but also challenged the monopolistic grip of major tech corporations.

EARLY FOUNDATIONS

Born in Zhanjiang, Guangdong province, Liang Wenfeng displayed exceptional mathematical abilities from a young age. His passion for problem-solving led him to pursue higher education at Zhejiang University, one of China's most prestigious institutions. At university, he refined his mathematical and analytical skills, laying the groundwork for a career that would eventually bridge the worlds of finance and technology. After graduation, Liang entered the finance industry, quickly making waves by applying mathematical models to market predictions. He later founded High-Flyer, a quantitative hedge fund that managed approximately \$8 billion in assets. Under Liang's leadership, the firm pioneered the use of AI-driven trading algorithms, which consistently outperformed the market. This experience provided Liang with a deep understanding of

AI's real-world potential—knowledge that would later shape his AI venture, DeepSeek.

STRATEGIC FORESIGHT

One of Liang's boldest moves came in 2021 when he anticipated U.S. export controls on advanced semiconductors. Recognizing the potential disruption to AI development in China, Liang stockpiled Nvidia graphics processing units (GPUs), ensuring DeepSeek had access to the computational power it needed. This strategic foresight allowed his company to bypass critical bottlenecks that hampered other Chinese tech startups, solidifying Liang's reputation as a visionary leader with an eye for long-term trends.

In May 2023, Liang founded DeepSeek, an AI startup focused on pushing technological boundaries rather than seeking immediate commercial success. With a modest \$6 million budget, DeepSeek developed an AI model comparable to OpenAI's ChatGPT—an achievement that stunned the industry, given the typically massive costs associated with such projects. This breakthrough established DeepSeek as a formidable contender in the global AI race. Central to DeepSeek's philosophy is its open-source approach. Unlike many tech giants that guard their AI models with secrecy, Liang made DeepSeek's AI technology publicly accessible. By doing so, he not only democratized access to cutting-edge AI but also encouraged a global culture of innovation. His decision disrupted the status quo, giving smaller developers and startups the opportunity to build on DeepSeek's foundation without being locked out by corporate monopolies.



OF THE MONTH

RESHAPING GLOBAL INNOVATION

CREATIVITY AND COLLABORATION

Liang's leadership style is as unconventional as it is effective. Rather than adhering to traditional hiring practices, he prioritizes diverse perspectives. His team at DeepSeek includes Generation Z innovators, literature enthusiasts, and humanities graduates—all chosen for their creativity and unique worldviews. By fostering an environment that values fresh ideas over rigid technical experience, Liang has cultivated a workplace culture that thrives on innovation and originality. This collaborative ethos has enabled DeepSeek to develop unique AI solutions that stand out in a crowded industry. Liang's approach emphasizes problem-solving through multiple lenses, a strategy that has yielded rapid advancements in DeepSeek's AI capabilities.

Despite his remarkable achievements, Liang remains a low-profile figure in public. He rarely engages in media appearances, choosing instead to let DeepSeek's accomplishments speak for themselves. However, within the tech community, Liang's humility and engineering mindset have earned him widespread respect. His decision to open-source DeepSeek's code further solidified his reputation as a champion of collaborative advancement in AI. While many leaders chase public recognition, Liang's quiet dedication to innovation has positioned him as a role model for the next generation of tech entrepreneurs. His influence extends beyond DeepSeek, inspiring others to adopt more open and inclusive approaches to technology development.

CHALLENGES AND CONTROVERSIES

Liang's rise has not been without controversy. Critics have raised concerns about data privacy, the implications of China's expanding technological influence, and potential geopolitical tensions surrounding AI innovations. However, Liang has remained steadfast in his vision, emphasizing transparency and ethical AI practices. His open-source philosophy has been key to addressing these concerns, as it allows independent developers and watchdog organizations to review and improve upon DeepSeek's code. DeepSeek's commitment to transparency has helped the company navigate regulatory challenges and build trust with its global audience. Liang's proactive approach to these issues demonstrates his deep understanding of both technological and geopolitical dynamics.

As DeepSeek looks ahead, Liang's focus remains on developing the next generation of AI models that are faster, more efficient, and more accessible. His vision for AI goes beyond commercial success—he aims to create technologies that address global challenges, from education and healthcare to environmental sustainability. Under Liang's leadership, DeepSeek is working on AI models that can adapt to different cultural contexts, breaking down language and cultural barriers that have long limited the global applicability of AI technologies. The geopolitical challenges, deep concerns on data privacy and possible backend state control by China has led to an environment of suspicion around DeepSeek. Concerned with unfair data exploitation several countries including India has banned the DeepSeek. Creating global acceptability will be the biggest challenge the DeepSeek may be faced with.

SHAPING THE FUTURE

Liang Wenfeng's journey from math prodigy to AI pioneer is a testament to the power of vision, foresight, and a commitment to innovation. Through DeepSeek, he has redefined what's possible in AI, challenging industry giants and fostering a more open and inclusive technological landscape. As Liang continues to push boundaries and drive global collaboration, his influence on the AI industry is poised to be both profound and enduring. His story serves as a powerful reminder that innovation is not just about technology—it's about people, ideas, and the relentless pursuit of progress.

US NAVY'S ESB SHIPS REDEFINE POWER DYNAMICS

WAR STRATEGY

The West Philippine Sea and the South China Sea are critical routes for international trade and resources, causing disputes between China and several Southeast Asian countries like Vietnam, the Philippines and Malaysia. Control over this waterway has become a major issue due to its importance as a global shipping lane and its vast underwater resources. The United States has taken a keen interest in the region, especially as China makes assertive and expansive territorial claims in the region.



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DEFENCE ANALYST, MANILA, PHILIPPINES
FOR TNJ

The South China Sea spans over 3.5 million square kilometers and is rich in resources like oil and gas. It is also a crucial waterway, with over \$5 trillion worth of trade passing through it annually. China claims most of this sea, including the West Philippine Sea and the islands and reefs also claimed by other nations. This claim called the "Nine-Dash Line," has led to increased tensions with several South East Asian countries. The United States and other international major players have pushed back against China's claims, stressing the 2016 Hague ruling and the importance of freedom of navigation and international law, particularly as outlined in the United Nations Convention on the Law of the Sea (UNCLOS).

China, for the past few years, has been militarizing the region by building artificial islands with military infrastructure, radar stations, airstrips, and missile systems, to assert its control and dominance in the region. To cope with this issue, the US Navy on the other hand has increased its presence in the West Philippine Sea and the South China Sea, conducting regular freedom of navigation operations (FONOPs) to challenge China's claims and maintain the principle that international waters should remain open to all countries.

WHAT IS A ESB SHIP?

The US Navy's Expeditionary Sea Base (ESB) ships are



converted oilers, originally designed to refuel other vessels at sea. These ships have been transformed into versatile floating bases equipped with flight decks for helicopters and drones, facilities for special operations forces, and command-and-control centers. This conversion allows them to support a wide range of missions, from military operations to humanitarian aid. ESBs can operate in open water, providing a consistent US presence in contested areas like the West Philippine Sea and the South China Sea. Their ability to project power without relying on land-based infrastructure makes them a significant asset for the US Navy in maintaining regional stability and countering China's military build-up.

US Navy's Expeditionary Sea Base (ESB) ships represent a groundbreaking development in how the US projects power and ensures stability in the West Philippine Sea and South China Sea.



ability to operate in open water, can provide a consistent US military presence in the region, even when faced with adversary challenges and threats. ESBs can serve as mobile bases from which US military forces can conduct maritime security operations, humanitarian missions, and intelligence gathering without relying on local land facilities.

The ability to operate in contested waters without needing a fixed, land-based presence is a key strategic advantage in an environment where China has militarized islands and reefs to create fortified military strongpoints. ESB ships can counterbalance this, allowing US forces to maintain a visible and sustained

ROLE OF ESB SHIPS

The US Navy's Expeditionary Sea Base (ESB) ships, which have been operational since 2019, are versatile and strategic assets in the American efforts to counter China's growing military presence in the West Philippine Sea, the South China Sea, and anywhere in the world. ESB ships are a new class of converted vessels that provide a flexible, adaptable platform for various military and humanitarian operations. They are designed to operate in different environments, including contested waters like those in the West Philippine Sea. These ships are a crucial part of the US Navy's expeditionary force projection capabilities.

ESBs are essentially mobile naval bases that can support a wide range of operations, from aviation operations (like helicopters and drones) to the launch and recovery of special operations forces. With a flight deck larger than that of an amphibious assault ship and extensive onboard facilities, they serve as a command-and-control hub and a staging area for maritime and land-based operations. This flexibility makes them particularly useful in the complex and contested security environment of the West Philippine Sea and the South China Sea.

FORWARD PRESENCE IN THE REGION

One of the primary advantages of ESB ships is their ability to project power into the Southeast Asian region without needing land-based infrastructure. Traditional naval operations often rely on access to ports or airfields in allied nations or on disputed territories. ESBs, on the other hand, with their

presence while avoiding the vulnerabilities associated with permanent military land installations.

IMPROVED OPERATIONAL FLEXIBILITY

ESBs can support a wide variety of operations beyond traditional naval combat roles. This includes humanitarian missions, surveillance operations, and air support and sea-based special operations forces. The US Navy can deploy ESBs in the West Philippine Sea and South China Sea for various purposes. It can support humanitarian missions and can quickly provide relief during natural disasters like typhoons, earthquakes, and tsunamis, enhancing US influence and fostering goodwill in the Asia Pacific region.

ESBs help combat piracy, illegal fishing, and drug trafficking in Southeast Asia by serving as bases for surveillance aircraft and drones, providing real-time intelligence, and enforcing international maritime laws. They have large flight decks for helicopters and drones and can deploy special forces for missions in the West Philippine Sea and South China Sea, adding flexibility and surprise to US military operations in the region.

COOPERATION WITH REGIONAL ALLIES

The United States is not alone in its efforts to maintain stability in the West Philippine Sea and the South China Sea. Several nations in the region, including Japan, South Korea, Australia, and the Philippines, have expressed concerns about China's growing military influence. The

ESBs offer a unique opportunity for multilateral operations. The flexibility of these vessels allows for joint operations with regional allies, enhancing interoperability and strengthening partnerships. Additionally, the US Navy's ability to quickly position ESBs in key locations in the West Philippine Sea can facilitate rapid cooperation with allies during security challenges, such as maritime skirmishes or disputes over fishing rights.

As China continues to build its military presence and infrastructure on man-made islands, the US response is not only about direct military confrontations but also about maintaining a strong, visible deterrent military force. The ESBs can send clear messages about the US commitment

Moreover, the adaptability of the ESB platform—capable of supporting a variety of mission sets and operating in various types of environments—ensures that the US Navy can maintain a presence in the region despite challenges from China's military build-up. Whether through direct engagement, humanitarian assistance, or maritime security operations, the ESBs provide the US with an unparalleled tool for maintaining its influence in the region.

The US Navy's Expeditionary Sea Base ships are a game-changer in the context of the West Philippine Sea and the South China Sea disputes. These unique vessels provide the US Navy with unprecedented flexibility, operational reach, and the ability to project power in a volatile



to the principles of freedom of navigation and international law. Furthermore, their capacity to host large contingents of troops and equipment allows for rapid responses to regional crises or escalations, providing the US with a more flexible and credible deterrent capability.

The deployment of ESB ships represents a key strategic shift in how the US approaches its military presence in the Southeast Asian region. As China continues to assert its dominance through the expansion of military infrastructure in the region, the US response has moved beyond traditional FONOPs to more cost-effective, dynamic, flexible, and sustained operations. The ESBs, with their unique capabilities, will likely play an increasingly central role in countering China's strategic military objectives while enhancing regional security and stability.

region where China's growing military presence poses significant challenges. With their ability to operate in contested waters, serve as forward-operating bases, and support a wide range of operations, ESBs enable the US to assert its commitment to regional stability and freedom of navigation. As the geopolitical dynamics in the South China Sea continue to evolve, the strategic importance of these versatile ships will only continue to grow.

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The presence of US Navy ESBs in the West Philippine Sea and the South China Sea serves as a powerful signal to China and other hostile regional actors.

TRUMP PUSHES LATIN AMERICA INTO CHINA'S ARMS

COUNTERVIEW

Donald Trump's return to the White House could redefine U.S.-Latin America relations. His aggressive foreign policies—ranging from economic pressure to ideological confrontations—risk pushing Latin America further into China's economic and diplomatic sphere. Yet the U.S. has secured key wins in migration deals. While Washington resorts to coercion, Beijing offers trade and investment without political strings, making China an increasingly attractive partner.



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Donald Trump's return to the White House promises a dramatic shift in U.S.-Latin America relations. His aggressive, unilateralist approach—rooted in economic coercion and ideological confrontation—may backfire, pushing the region deeper into China's embrace. For Latin America, the U.S. wields the stick, while China offers the carrot.

From threats of military intervention in Panama to punitive tariffs on Mexico and hawkish policies toward leftist governments, Trump's administration echoes 19th-century imperial diplomacy. Yet, Latin America today is far more independent and pragmatic, increasingly looking to China for trade, investment, and infrastructure projects. If Washington continues to alienate its neighbours, it risks losing its long-standing influence to Beijing, whose less intrusive, trade-focused diplomacy is gaining traction.

CHINA'S STRATEGIC EXPANSION

Trump's foreign policy is shaped by two seemingly contradictory figures: Marco Rubio, an ideological hardliner obsessed with regime change in Cuba and Venezuela, and Trump himself, a dealmaker with a transactional worldview. This uneasy balance creates a mix of rhetoric-heavy ideological warfare and pragmatic backchannel diplomacy.

Rubio, now Secretary of State, sees Latin America as a battleground against socialism and Chinese influence. His hawkish stance aims to isolate leftist governments, such as those in Cuba, Nicaragua, and Venezuela,

impose sanctions, and promote conservative opposition movements. His approach, however, risks alienating the very countries he hopes to bring closer to Washington.

Trump, on the other hand, has demonstrated a more pragmatic streak when ideology clashes with economic interests. His administration's quiet negotiations with Venezuelan President Nicolás Maduro to secure the release of American prisoners suggest he may abandon the failed regime-change policies of his first term. Instead, Trump is likely to focus on aggressive economic pressure—tariffs, sanctions, and trade threats—to strong-arm Latin American nations into aligning with U.S. interests.

While Trump's rhetoric isolates the U.S. from its southern neighbours, China is capitalising on the opportunity.



Beijing's economic strategy in Latin America is centred on infrastructure investment, trade agreements, and non-interventionist diplomacy—an approach that contrasts sharply with Washington's history of political meddling.

China has become the leading trade partner for Brazil, Chile, Peru, and Uruguay and is the second-largest for Argentina. The Belt and Road Initiative (BRI) has provided much-needed funding for railways, ports, and energy projects across the region. Unlike U.S. aid, which often comes with political conditions, Chinese investment is perceived as pragmatic and unconditional, making it highly attractive to Latin

China, meanwhile, has been steadily increasing its economic presence in Mexico. Chinese automakers, such as BYD and MG Motor, are investing in production facilities to gain access to North American markets. Lenovo, Hisense, and major Chinese industrial firms are also expanding operations in northern Mexico, taking advantage of U.S.-Mexico-Canada Agreement (USMCA) loopholes to export to the U.S. tariff-free.

If Trump's aggressive policies persist, Mexico may seek to diversify its economic ties further, leveraging Chinese investment as a counterweight to U.S. pressure. This shift



Trump's foreign policy mix—Rubio's ideological hardline stance and his transactional approach—creates inconsistencies, alienating key regional players while inadvertently strengthening China's influence.

American governments seeking economic growth without external interference.

MEXICO: A BALANCING ACT

Mexico finds itself at the centre of Trump's renewed hostility towards Latin America. His threats to impose tariffs, designate cartels as terrorist organisations (a potential backdoor for direct military intervention in Mexico), and tax remittances from Mexican workers in the U.S. have heightened tensions. However, President Claudia Sheinbaum has signalled a more assertive response than her predecessors, warning of retaliatory measures against U.S. exports. The first quarrel has been temporarily resolved, with Mexico agreeing to deploy 10,000 troops to its northern border to curb undocumented migration, drug trafficking, and fentanyl smuggling.

could challenge Washington's ability to dictate trade terms in the region.

BRAZIL: THE BATTLEGROUND

Brazil represents the most significant geopolitical contest between the U.S. and China in Latin America. Despite not formally joining the BRI, Brazil has become China's top trade partner, exporting soybeans, iron ore, and beef in record volumes. Chinese companies have invested heavily in Brazil's energy sector, particularly in renewables, oil, and infrastructure.

Under President Lula da Silva, Brazil has adopted a pragmatic, cautious approach, balancing relations with both powers while personally favouring China. However, this preference faces resistance from conservative factions in diplomacy and business, as Brazil's elites generally lean towards stronger

ties with the U.S. over China.

Furthermore, Lula appeared to treat former U.S. President Joe Biden as if he owed him a debt—one that was being repaid through actions such as Brazil's decision not to join the Belt and Road Initiative, withholding recognition of Maduro's victory in the Venezuelan elections, and blocking Venezuela's entry into BRICS. These were not natural moves for Lula or Lula acting in his usual manner.

This stance is rooted in the fact that Biden firmly opposed the attempted coup by former Brazilian President Bolsonaro, along with certain military generals and close aides, who sought to prevent Lula's inauguration after his electoral victory in November 2022.

However, Trump's re-election poses a dilemma for Brasília. Trump's hostility towards BRICS and his threats of sanctions on countries reducing reliance on the U.S. dollar could strain U.S.-Brazil relations. Meanwhile, China continues to deepen its engagement, with Chinese electric vehicle manufacturers setting up factories and Chinese banks expanding their footprint in Brazil's financial sector.

Should Trump continue his tariff-and-threat diplomacy, Brazil may further pivot towards China, solidifying Beijing's economic influence in South America's largest economy.

Despite his confrontational approach, Trump has secured some key victories in Central America. Guatemala agreed to increase deportation flights by 40%, while El Salvador accepted a "Safe Third Country" agreement that allows non-Salvadoran migrants to be deported there.

Panama, under intense U.S. pressure, withdrew from China's Belt and Road Initiative, marking a significant win for Washington. However, it resisted Trump's demand to grant free passage for U.S. government vessels through the Panama Canal, citing constitutional restrictions. This partial defiance underscores the complexities of keeping China at bay—while some countries yield to U.S. pressure, they also seek to maintain their sovereignty.

In Venezuela, Trump's administration secured the release of six American detainees and struck a deal for deported Venezuelans to be accepted back. Trump's decision to send his special envoy also signifies a pragmatic approach by the U.S., focusing on immediate issues such as migration and detainee release, while implicitly recognising Maduro's leadership. This move sets the stage for a further deepening of relations between the two countries, including the potential easing of U.S. sanctions and the resumption of Venezuelan oil imports by the U.S.

However, the hawkish Marco Rubio strongly opposes this

deference to Maduro, launching fierce criticism and affirming that the U.S. does not recognise him as the legitimate president-elect of Venezuela. This hardline stance is likely the reason why Rubio was sidelined, with Trump opting instead to send his envoy, Richard Grenell.

DECLINE OF THE MONROE DOCTRINE?

For nearly two centuries, the Monroe Doctrine justified U.S. dominance in Latin America. However, in the face of China's growing economic presence, its relevance is being questioned. Trump's brand of foreign policy—marked by confrontation and economic coercion—risks accelerating the region's shift away from Washington.

Latin American leaders are increasingly vocal about their desire for autonomy in foreign affairs. China's approach, which emphasises trade and investment without political interference, aligns with this aspiration. If the U.S. continues to act as an overbearing hegemon rather than a reliable partner, Latin America may conclude that its future lies with Beijing.

A STRATEGIC MISCALCULATION?

Trump's return to power presents a critical moment for U.S.-Latin America relations. If his administration prioritises economic threats and ideological confrontation over cooperation, it will likely drive the region further into China's sphere of influence.

Latin America is no longer the passive recipient of U.S. dictates. It is actively shaping its own economic and geopolitical destiny. Unless Washington adapts to this new reality, it may find itself watching from the sidelines as China cements its role as Latin America's leading economic partner.

For Trump, the biggest irony may be that his aggressive policies—intended to assert U.S. dominance—end up achieving the exact opposite.

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Mexico faces U.S. trade threats but benefits from Chinese investment, while Brazil balances U.S. ties with China's expanding economic footprint.

INDUSTRY WATCH

Research and Innovation Circle of Hyderabad (RICH) is the nodal agency for the Hyderabad Science & Technology (S&T) Cluster. It is an initiative spearheaded by the Office of Principal Scientific Adviser to the Government of India, where it is driving multidisciplinary projects. RICH aims to address complex local and national challenges by facilitating collaboration between research institutions, industry, government, and start-ups. The News Analytics Journal (TNJ) spoke exclusively to Ms Rashmi Pimpale (RP), CEO of Research and Innovation Circle of Hyderabad. Excerpts from the interview.

TNJ: RICH bridges research, innovation, and commercialisation. How do you prioritise initiatives to ensure a balance between fostering innovation and driving tangible market outcomes?

RP: At RICH, we focus on three crucial sectors: Life Sciences, Food & Agriculture, and Sustainability. Our mandate is to translate innovations from labs to markets and ideas into commercial ventures, ensuring both immediate and long-term societal benefits. We operate at the intersection of government, startups, research institutes, and industries to build a cohesive ecosystem. By aligning our efforts with the state's and nation's broader goals, we prioritise initiatives that promise high-impact outcomes while fostering innovation across diverse domains.

TNJ: With the Global AI Summit 2024 hosted in Telangana, how does RICH envision shaping India's role in AI leadership, and what key collaborations are pivotal to this goal?

RP: As part of the Global AI Summit 2024, RICH hosted a curtain-raiser event that convened key stakeholders to explore AI applications in healthcare administration, clinical practices, and talent development. As part of Telangana's AI

Research and Collaboration Network led by RICH, we are collaborating with leading research institutes in Hyderabad to scale impactful projects directly aligned with the Telangana government's vision. This network will forge partnerships between academia, industry, and government to push the envelope on AI innovations. By leveraging these collaborations, RICH aims to position Telangana as a frontrunner in AI in diverse sectors, demonstrating how advanced technologies can address real-world challenges.

TNJ: The Women in STEM Cohort is one of your flagship programs. How do you measure its impact on reducing gender disparity in technology and innovation?

RP: The Women in STEM programme is a flagship programme designed to bridge the gender gap in the Life Sciences ecosystem by offering internships, mentorship, and scholarships to women students from rural or semi-urban areas with lower socioeconomic backgrounds, particularly those enrolled in Tier 2 or Tier 3 institutions across India. In line with the focus on building capacity in key STEM fields, the programme prioritises applicants from life sciences, chemistry, pharmaceuticals, and applied biology disciplines. The programme partners with premier institutions and industries in Hyderabad to facilitate hands-on research internships in cutting-edge research laboratories. This initiative empowers students to gain practical skills, exposure to advanced lab technologies, and invaluable industry/institution insights, laying a strong foundation for their professional journeys in STEM fields.



MS RASHMI PIMPALE

CEO of Research and
Innovation Circle
Hyderabad

We measure the programme's impact by evaluating the number of students placed at premier industries and institutions for research internships and tracking their career trajectories post-completion. Metrics such as the proportion of participants advancing to higher education and securing roles in Life Sciences R&D serve as key indicators. Students and mentors feedback and mentorship evaluations ensure continuous programme refinement, while success stories of alumni highlight the programme's role in nurturing a pipeline of skilled women researchers. The programme aims to create a lasting legacy of gender equality in the Life Sciences ecosystem.

TNJ: As RICH explores green hydrogen's potential, what are the biggest challenges in scaling this technology in India, and how are you addressing them?

RP: There is significant interest in the industry when it comes to Green Hydrogen, but at the same time, industries are also looking to lower their failure risk and seeking mature technologies. This offers major challenges in scaling technologies as the Green Hydrogen ecosystem in India itself is in its nascency and technologies are also evolving very rapidly. We are addressing this challenge by taking a shared risk-reward model wherein we are bringing together multiple players with similar interests but with varied levels of risk-taking appetite. Through this approach, the entities can jointly explore the opportunities and share the learnings from the projects. This experience helps them put guardrails to avoid project failures and approach additional projects and newer opportunities with more understanding and confidence.

TNJ: Workshops like the geospatial technology program for AgriTech highlight RICH's focus on agriculture. How does RICH plan to integrate technology for sustainable farming at scale?

RP: One of the key focus areas for RICH in Agriculture is to promote innovative technologies for sustainable agriculture at scale. RICH promotes these solutions through startup support programmes, ecosystem-building initiatives like enabling collaborations to scale innovative Ag-tech solutions, stakeholder consultations, seminars and round tables, and support in cutting-edge/innovative project design & development through ongoing initiatives/projects to leverage technology for sustainable farming.

Some of the solutions supported by RICH include:

Precision Farming Technologies – These tools optimise resource use (water, fertilisers, etc.), improving efficiency and productivity while minimising environmental impact. They also help farmers adapt to climate change by providing data-driven insights.

Crop and Soil Health Monitoring – Sensor-based and geospatial technologies enable farmers to monitor crop health, predict risks, and make informed decisions, enhancing climate resilience and ensuring food security.

Traceability Technologies – Blockchain and other emerging tools ensure transparency and efficiency in the supply chain, improving food safety and quality.

Geospatial Data for Credit Services – Geospatial and satellite data enable farmers to access credit-linked services, empowering smallholders with better financing options and enhancing economic resilience.

Carbon Credit Technologies – Technologies that help farmers measure and earn carbon credits promote sustainable farming practices and offer additional revenue streams, contributing to global climate goals.

Farm Mechanisation – Drones and AI-powered tools reduce labour dependency, increase efficiency, and improve timely agricultural operations, ensuring sustainable productivity.

TNJ: RICH works with both national and international partners. What unique opportunities have you identified in these collaborations to boost India's innovation ecosystem?

RP: RICH serves as a bridge connecting both Indian and international startups, fostering growth and innovation. Our collaborations with national and international partners unlock unique opportunities for strengthening India's innovation ecosystem.

For instance, through our partnership with JICA (Japan International Cooperation Agency), we help Indian startups understand the Japanese market by offering market research, validation, and regulatory compliance support. Simultaneously, we assist Japanese startups looking to expand into India by providing insights into the local market, facilitating manufacturing partnerships, and ensuring alignment with Indian regulatory frameworks.



RICH **Research and Innovation** **Circle of Hyderabad**

Similarly, the EU-Indo Innocenter enables Indian startups to enter the European market with support in product adaptation, market entry strategies, and partnerships. In return, European startups are introduced to opportunities within India's vast healthcare ecosystem, including clinical validation, cost-effective manufacturing setups, and access to R&D infrastructure.

Collaborations with embassies of various countries in India also play a dual role. On one hand, they facilitate Indian start-ups' entry into international markets, and on the other, they help international startups explore opportunities in India, such as local partnerships for manufacturing, clinical trials, and distribution networks.

As a regional S&T cluster, we are continuously trying to develop international linkages to promote stronger cross-border research and technology innovation networks. As such we have established collaborations with Innovation Norway, EU-India Innocenter, Catapult and other innovation agencies. Engaging with agencies creates a strong pipeline of international startups that are looking for soft landing support, and also gives us the ability to leverage these international agencies for reciprocal support for Indian startups seeking to enter international markets. Few examples that we are working with are Be-Energy in battery space, Sohytech and Agastya in Green Hydrogen space, etc.

By fostering such two-way collaborations, RICH not only boosts the global competitiveness of Indian startups but also positions India as a gateway for international startups to tap into a diverse and rapidly growing market. This comprehensive approach strengthens the innovation ecosystem, driving growth and creating impactful solutions across borders.

TNJ: RICH operates at the intersection of research, innovation, and commercialisation. In your view, what is the most significant bottleneck preventing Indian startups from translating research into scalable products, and how is RICH addressing this challenge uniquely?

RP: Indian startups across sectors such as Life Sciences, Food & Agriculture, and Sustainability face common challenges in translating research into scalable products. These include regulatory complexities, limited funding, insufficient ecosystem linkages, and the need for validation and testing.

In Life Sciences, startups struggle with clinical validation and regulatory approvals, while in Food & Agriculture, the lack of access to farmer networks, agricultural data, and government linkages creates roadblocks. Sustainability startups face unique barriers such as high upfront costs and ecosystem-wide adoption requirements. Addressing these challenges requires a robust ecosystem of partnerships, funding, and sector-specific expertise.

RICH tackles these bottlenecks by acting as a bridge between startups, stakeholders, and resources. For Life Sciences, we facilitate access to regulatory experts, clinical institutions, and funding networks. In Food & Agriculture, we connect startups with FPOs, provide critical agricultural data through partnerships like MNCFC, and enable government linkages. For Sustainability, we offer policy guidance, pilot project support, and industry collaborations. By integrating startups with research institutions, farmer networks, and sustainability ecosystems, RICH empowers them to validate, refine, and scale their innovations, creating meaningful impact across sectors.

TNJ: With the increasing global focus on sustainability, how is RICH fostering collaborations between academia, startups, and industries to promote green technologies, and what breakthrough innovation in this space excites you the most?

RP: RICH fosters the development of innovation networks by bringing together the key stakeholders of the innovation ecosystem such as research and academia, startups and industries to address major challenges in the sustainability area. Sustainability is a vast area that cuts across multiple sectors, there are often multiple approaches to addressing the problems. What we realised works most effectively to foster collaborations in the sustainability area is to take the route of projects, where we bring together the innovation ecosystem stakeholders and then jointly work towards solving the problem collectively. This ensures that there is buy-in from end users and ownership from all the stakeholders involved. While it's difficult to pick a certain innovation or space as being a breakthrough, we are most excited about the Energy materials space as it has large-scale implications on multiple areas like Batteries, Solar paints, Solar panels, Green buildings, Green Hydrogen, etc. All these areas have high innovation potential and significant societal impact.

GREENLAND'S STRATEGIC IMPORTANCE IN GLOBAL SECURITY

LONG SHOT

Greenland, the world's largest island, has emerged as a strategic asset in global security due to its Arctic location, vast natural resources, and geopolitical significance. As climate change opens new trade routes and increases access to untapped minerals, global powers—particularly the U.S., Russia, and China—are competing for influence. Greenland must navigate complex security, economic, and environmental challenges while balancing autonomy, sustainable development, and growing global interest in its territory.



**AIR MARSHAL ANIL KHOSLA (RETD)
FOR TNJ**

Greenland is the world's largest island, located in the Arctic, to the northeast of Canada. Politically, it is an autonomous territory of Denmark, it has its own government and parliament. With a landmass of approximately 2.16 million square kilometers, and population of around 56,000, Greenland is sparsely populated most of whom live along the island's coast. Most of its land is covered by an ice sheet, which holds a significant portion of the world's freshwater. This ice sheet is vital to global climate patterns, as its melting could raise sea levels and disrupt ocean currents. While Greenland is rich in natural resources such as minerals, oil, and gas, its remote location and harsh environment make resource extraction challenging. Its

strategic location has historically been important to European and American interests, particularly during the Cold War, when the U.S. established military bases there.

RECENT LIMELIGHT

Greenland has recently been at the center of international attention due to renewed interest from the United States in acquiring the territory. In December 2024, President Donald Trump reiterated his proposal for the U.S. to purchase Greenland from Denmark, citing national security concerns. This proposal builds upon a similar offer made during his first term, which the Danish government declined. In response to these developments, 85% of Greenlanders



oppose becoming part of the United States. Greenland's Prime Minister, Múte Egede, has emphasised that while Greenland is open to discussing common interests with the U.S., the island is not for sale. The situation has led to increased diplomatic activity, with Denmark announcing plans to invest 14.6 billion crowns (\$2.04 billion) to bolster its military presence in the Arctic. European leaders have also supported Denmark, highlighting Greenland's strategic importance in global geopolitics. These events underscore Greenland's significant role in international affairs, particularly concerning Arctic sovereignty, natural resources, and global security dynamics.

enhances the ability to monitor and regulate these routes, making it a strategic chokepoint in global trade.

Militarily: Greenland's airspace and maritime routes are crucial for transatlantic military logistics. In any potential conflict in the North Atlantic, control over Greenland would be pivotal for ensuring regional dominance. Greenland provides a staging ground for air and naval operations in the Atlantic and Arctic, making it essential for NATO's security umbrella. The U.S. maintains Thule Air Base in northern Greenland, a key North American early-warning defence system component. Thule is home to



RESOURCE POTENTIAL

Greenland has vast natural resources, including rare earth elements, uranium, oil, and gas. These resources are essential for global industries, including defence, technology, and renewable energy. While Greenland's government has moved away from oil exploration, its untapped reserves remain a strategic interest for global energy markets. Greenland's waters are among the richest fishing grounds, a key economic driver and a point of interest for international players. Foreign mining and energy investment must balance economic benefits, sustainability concerns, and geopolitical risks.

Trade Routes: Greenland's location in the North Atlantic and Arctic regions makes it an invaluable strategic asset. It lies between North America and Europe, a crucial military and trade operations link. The island provides access to key shipping lanes, including the emerging Arctic Sea routes, which are becoming more navigable. As Arctic ice melts, new shipping lanes such as the Northwest Passage and the Northern Sea Route are opening up, reducing travel distances between Asia, Europe, and North America. Control over Greenland

a ballistic missile early warning radar and a deep-space surveillance system.

SUPERPOWER RIVALRIES

Greenland, the world's largest island, has become an increasingly significant player in global geopolitics. Its strategic position in the Arctic, vast natural resources, and the effects of climate change have heightened interest from global superpowers such as the United States, Russia, and China. As geopolitical tensions rise, Greenland's role in security, trade, and military strategy continues to expand, making it a focal point of international competition. However, the Arctic also presents opportunities for international cooperation, particularly in the areas of scientific research, environmental protection, and sustainable resource management. The Arctic Council, for example, provides a forum for Arctic states to discuss and coordinate on issues of mutual interest, demonstrating that the region's geopolitical significance is not solely defined by competition.

The United States has long viewed Greenland as an essential

As climate change makes resource extraction more feasible, Greenland faces a dilemma between economic development and environmental protection.

part of its Arctic strategy and has maintained a strategic presence in Greenland for decades. During World War II, the U.S. took over defence responsibilities for Greenland from Denmark to prevent German occupation. Since then, it has remained a key ally in Arctic security. In 2019, former U.S. President Donald Trump proposed purchasing Greenland from Denmark, highlighting its strategic importance. Though Denmark and Greenland rejected the proposal, it underscored the island's increasing geopolitical value. The U.S. has continued to strengthen ties with Greenland through economic aid and security cooperation, recognising its role in countering Russian and Chinese influence in the Arctic. Greenland's strategic location and natural resources make it a key player in the geopolitical competition in the Arctic, and its alignment with the U.S. helps to balance the influence of Russia and China in the region. Moscow views the Arctic as crucial for national security, energy extraction, and global influence. Russia has been actively expanding its Arctic military capabilities, reopening Soviet-era bases, deploying new icebreaker ships, and establishing Arctic brigades. The country considers

newly elected government banned uranium mining, blocking a major Chinese-backed project. This decision was seen as a move to limit Chinese influence in the region and align more closely with Western allies.

FUTURE PROSPECTS

Greenland is an autonomous territory within the Kingdom of Denmark, with its government and growing aspirations for independence. While it relies on Denmark for defence and financial support, Greenland has sought greater economic and political autonomy. For Greenland, balancing economic development with national security concerns remains a challenge. Denmark has recognised Greenland's strategic importance and has increased its Arctic military budget. In 2024, Denmark announced a \$2 billion investment to enhance its Arctic security capabilities, reinforcing its commitment to maintaining stability in the region. Given its strategic military importance, the U.S. has shown interest in strengthening ties with Greenland outside of Danish influence, and its role in NATO could grow. The island's



the Arctic a key strategic frontier for national security and resource exploitation. Russia's growing military infrastructure, including reported hypersonic missile deployments and submarine operations, has heightened concerns among NATO allies.

China identifies itself as a "near-Arctic state" and has actively sought economic opportunities in Greenland, investing heavily in Arctic infrastructure, scientific research, and resource extraction. Greenland's rare earth minerals are mainly of interest to China, which seeks to diversify its supply chains. China has also pursued scientific research in the Arctic, positioning itself as a key player in Arctic governance. However, its increasing presence has alarmed Western powers, who view Beijing's activities as part of a broader strategy to expand its geopolitical influence. In 2018, the United States successfully pressured Denmark to block Chinese investments in Greenland's airport infrastructure, fearing potential military implications. In 2021, Greenland's

leadership must navigate pressures from global powers while ensuring sustainable growth and environmental protection. Greenland is not just a remote ice-covered island but a critical player in global security dynamics. Its location, resources, and military significance make it a key area of interest for major powers, including the United States, Russia, and China. As Arctic geopolitics intensify, Greenland's strategic importance will only increase. Whether through military cooperation, resource management, or diplomatic engagements, Greenland will remain at the heart of global power dynamics in the 21st century. Ensuring its stability and security will be crucial for maintaining Arctic balance and broader global stability.

*(Air Marshal Anil Khosla (R), Former Vice Chief, Indian Air Force. Researcher & Analyst Distinguished Fellow - USI & CAPS. The views expressed are of the author and do not necessarily reflect the views of **The News Analytics Journal**.)*

The United States views Greenland as vital to Arctic security, strengthening military ties and economic aid to counter Russian militarization and China's strategic investments in Greenlandic infrastructure.

INDIA'S DEFENCE BUDGET AND IT'S SECURITY CHALLENGES

SPECIAL FEATURE

India's Defence Budget 2025 allocates Rs 6.81 Lakh Crore with a pronounced focus on modernisation, procurement and enhanced R&D. While the initiative is ambitious, the declining share of defence spending in GDP raises critical questions about operational readiness and it's likely adverse impact on national security.



**LT GEN KAPIL AGGARWAL (RETD)
FOR TNJ**

The Union Budget presented on 01 February 2025, by all accounts, appears to be a growth-oriented budget and was hailed by eminent Economists and Captains of Industry. The Government has estimated a nominal GDP growth rate of 10.1% in 2025-26 (i.e. real growth plus inflation). The Fiscal Deficit for the ensuing financial year is estimated to be 4.4% of GDP, continuing the process of fiscal consolidation. For the Financial Year 2024-25, the actual fiscal deficit is likely to end at 4.8% of GDP (the planned figure was 4.9%).

The Central Government Debt to GDP ratio is estimated to decline to 56.1 % in FY 2025-26 from 57.1 % in FY 2024-25. The Central Government debt is on a declining path to attain a debt to GDP level of about 50±1 per cent by 31st

March 2031. The Government proposes to spend Rs 50.65 Lakh Crore in 2025-26, which is an increase of 7.4% over the Revised Estimate (RE) of 2024-25. Out of the total expenditure, Revenue Expenditure is estimated to be Rs 39.44 Lakh Crore and Capital Expenditure is estimated to be Rs 11.21 Lakh Crore (3.1% of GDP). Excluding loans and advances, the Capital Outlay has increased by just 10% over the RE 2024-25. The receipts (other than borrowings) in 2025-26 are expected to be Rs 34,20,409 Crore, an increase of 10.76% over the RE of 2024-25.

DEFENCE BUDGET

Total Allocation in the Defence Budget at the macro level is Rs 6.81 Lakh Crore, 13.45% of total Central Union Budget

presented on 01 February 2025, by all account Expenditure and 1.85 % of GDP. It is a jump of 9.53% over the Budget Estimate (BE) of the previous year (Rs 6.16 Lakh Crore). Capital Outlay of Rs1.8 Lakh Crore, an increase of 4.65% over BE of 2024-25. It is 26.43% of the total Defence budget. Distribution amongst the three Services has not been given, ostensibly due to the unpredictability of the tedious procurement process. Out of this, Rs 1,48,723 crore is planned to be spent on Capital Acquisition, termed as the modernisation budget of the Armed Forces and the remaining Rs 31,277 crore is for capital expenditure on Research & Development and the creation of infrastructural assets across the country.



Revenue(Excluding Pensions) of Rs 3.12 Lakh Crore is an increase of 10.24% over the BE of 2024-25. It is 45.76% of the total Defence budget. Out of this, Rs 1.14 Lakh Crore has been allocated on account of non-salary expenditure (ration, fuel, ordnance stores and maintenance/repair of equipment etc). The breakdown among the three Services are Air Force: Rs 53,700 Crore (increase of 16.1%), Navy: Rs 38,150 Crore (increase of 16.3%) and Army: Rs 2,07,520 Crore (increase of 7.7%).

While budgetary support for DRDO has been Rs 26,817 Crore (increase of 12.4%). Out of this, a major share of Rs 14,924 crore has been allocated for capital expenditure and to fund the R&D projects. The budgetary support for the BRO is Rs 7,146 Crore (increase of 9.74%).

A substantial share of the modernisation budget is earmarked for domestic industries' capital procurement. To encourage the private sector for manufacturing and technological development in the defence sector, a notable percentage of domestic share is further earmarked for acquisition from

domestic private industries. Accordingly, for FY 2025-26, Rs 1,11,544 crore, i.e. 75% of the modernisation budget, has been earmarked for procurement through domestic sources and 25% of the domestic share, i.e. Rs 27,886 crore, has been set for procurement through domestic private industries.

A COMPARISON WITH 2024-25

The present budget allocation of Rs 6.81 Lakh Crore, although 9.5% higher than BE 2024-25, is just 6.2% higher compared to the Revised Estimate (RE) 2024-25 of Rs 6.41 Lakh Crore, (on an overall basis). This is evident from the interesting table below, which reveals that at the RE stage 2024-25, the revenue budget had to be increased by Rs 14,450 Crore, while the capital expenditure fell short by Rs 12,500 Crore. The major factors were the additional expenditure on operational sustainment (Revenue) while the vagaries of the Defence Procurement Process took a toll on Capital expenditure.

DEFENCE BUDGET COMPARISON (IN RS CRORE)

Major Head	BE 2024-25	RE 2024-25	BE 2025-26	% Change 2025-26 BE to 2024-25 RE
MoD (Civil)*	52,448	57,516	59,498	3.44%
Defence Services (Revenue)	2,82,772	2,97,222	3,11,732	4.88%
Capital Outlay (Defence)	1,72,000	1,59,500	1,80,000	12.85%
Defence Pensions	1,41,205	1,57,681	1,60,795	1.97%

Extracted from Page 9 Serial 19-22, Demand for Grants 2025-26

*Excluding revenue receipts

OVERALL ANALYSIS

As outlined earlier, the Defence Budget 2025-26 has a total allocation of Rs 6.81 Lakh Crore, including approximately Rs 1.61 Lakh Crore in pensions. There is a perception of the Defence Budget being large and the need to cap it, especially the need to reduce the ever-burgeoning pension bill. Over the last 40 years, there has been a concerning decline in the Indian defence budget as a percentage of GDP, falling from about 3.5% to 1.85% in 2025-26. This is despite the Standing Committee on Defence (2018) recommending that the Ministry of Defence should be allocated a fixed budget of about 3% of the GDP to ensure adequate preparedness of the Armed Forces. If Pensions are excluded from the calculations, the Defence Budget stands at 1.41% of GDP.

It will also be of interest to compare the defence spending of our neighbouring and developed countries, the budgets as a percentage of GDP and overall Government expenditure. According to the data submitted by the Ministry of Defence to the Standing Parliamentary Committee on Defence in 2018, the Defence Expenditure comparison is as follows:-

While the overall defence allocation has grown by 9.5%, the capital modernization budget remains stagnant, hampered by tedious procurement processes and persistently conservative revenue estimates.

Country	As % of GDP	As % of Govt Expdr
China	1.9	5.5
US	3.2	9.0
Russia	3.9	11.4
Pakistan	4.0	18.5

It is evident that India can afford higher defence expenditure (from the perspective of GDP progression), yet the defence allocation is reducing in comparative terms vis a vis the overall Government expenditure. Over the last ten years, it is estimated that the money allocated to defence has been, on average, 22% lower than the projected needs by the armed forces.

From the brief analysis of earlier budgets, it is also evident that while revenue allocations have to be increased at the RE stage, the expenditure on the Capital account is sluggish and reappropriations have to be resorted to at RE stage. This is indicative of two aspects; one is that estimates of revenue expenditure tend to be conservative while Capital expenditure is beset with the tedious procurement process, even though there are a large number of pending modernisation projects. Since the pay and pension portion of revenue allocations of the defence budget tends to be inelastic, the brunt of inadequate financial resources is borne by the capital portion, which in turn adversely affects the modernisation of Forces.

IMPLICATIONS ON NATIONAL SECURITY

Every nation determines the resources which need to be spared for the security and defence of its territorial sovereignty, based on its national security strategy. A developing nation has to juggle competing requirements of Education, Health, Poverty Alleviation, etc while finalising the resource allocation. However, for a country like India, surrounded by hostile neighbours on the Northern and Western front, along with internal security challenges, it is inexplicable that the defence budget as a percentage of GDP is in a secular multi-decadal decline, the modernisation budget is almost stagnant in real terms, while the national GDP has grown more than 10 times in last three decades.

Operational preparedness of the Defence Forces, which directly impinges on national security, is a function of Soldier Readiness (Staffing and Training), Equipping & Equipment Readiness, together with the Doctrine, Strategy and Tactics. Thus, if equipping the armed forces with state-of-the-art, modern-generation fighter aircraft, warships, missiles, drones, guns, armoured vehicles, etc, is delayed while the adversaries upgrade their military, it is bound to have a debilitating effect on operational preparedness. The inadequate financial resources make for the larger cause for these delays.

With Rs 1.11 Lakh Crore (75% of the modernisation budget) reserved for the Indigenous Defence Industrial base, in consonance with the Atmanirbhar policy, it is imperative that both the public and private sector upgrade their technological and manufacturing capabilities expeditiously. For this to happen, the resources allocated for R&D have to be substantially increased, both at the Ministry of Defence level as well as the private sector. India is currently spending just about 0.75% of its GDP on R&D, which is very low, the world average being 1.8%. This is inadequate for the development of new technologies and state-of-the-art weapon systems in the long run.

The Ministry of Defence has decided to observe 2025-26 as the 'Year of Reforms', which will give impetus to the

modernisation of armed forces by simplification in the Defence Procurement Procedure (DPP) to ensure optimum utilisation of the allocation. Hopefully, the revision of DPP this time will enhance the ease of doing business for the private sector and encourage them to grab the numerous opportunities in the defence space.

THE BOTTOMLINE

Indian Defence spending, whether as a percentage of GDP or on a pro-rata basis, is decreasing gradually and continuously. The Defence funding is lower in comparison to most countries of interest, even though India has higher security concerns. Salary and pension bills being rather inelastic, the funding squeeze will either be on Capital Expenditure (read modernisation) or on Operational Sustenance of armed forces. This has adverse implications for overall national security.

Higher ab-initio allocation is required for the operational sustenance of armed forces. However, there is evidence of commendable flexibility in additional funding of defence requirements at the RE stage, based on operational requirements. Within the Defence Budget, the focus is on modernisation and infrastructure; however, procedural constraints seem to hamper the full absorption of allocated funds. The proposals of the 15th Finance recommendation on non-lapsable modernisation funds have to be implemented. It is also evident that Capital Outlay for procuring modern Weapon Systems/ Platforms can increase significantly only if higher funds are allotted to defence, i.e. a higher percentage of GDP or central government expenditure.

The initiatives on the Indigenisation of Defence Manufacturing are a potent way to conserve capital and need to gather further pace. Atmanirbhar is the way to go, but it will require an increase in domestic production capacity and upgraded technological prowess, for which higher R&D expenditure is required. Overall, a way has to be found in the ensuing decade to reverse the decline in defence spending as a percentage of GDP, accelerate the modernisation of armed forces and have a higher defence contribution in the Comprehensive National Power of India. This remains an unambiguous requirement to ensure the nation remains well-prepared against all security threats.

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Operational readiness suffers as inadequate equipping and slow modernisation threaten deterrence. Enhanced indigenous production and R&D funding are urgently needed to boost India's national power.

IN THE SPOTLIGHT

TRUMP BLAMES UKRAINE FOR WAR



US President Donald Trump suggested that Ukraine was responsible for the ongoing war, despite Russia's 2022 invasion. Speaking from Mar-a-Lago, he criticized Kyiv for not preventing the conflict and defended US-Russia talks in Saudi Arabia, which excluded Ukraine and European allies. Trump's comments risk damaging transatlantic relations and NATO's credibility. Ukrainian President Zelenskyy postponed his Saudi visit in response. Meanwhile, US Secretary of State Marco Rubio assured that Ukraine would be included in future negotiations. Experts warn the talks seem favorable to Russia, raising concerns about potential US concessions in the peace process.

DENMARK COMMITS €6.7BN DEFENCE BOOST



Danish Prime Minister Mette Frederiksen has announced a significant boost in Denmark's defence spending, committing an additional 50 billion kroner (€6.7bn) over the next two years. Speaking at Christiansborg Palace, Frederiksen stressed that defence cuts must never occur again, emphasizing that national security is at stake amid ongoing Russian rearmament and regional threats. Denmark, now set to spend over 3% of its GDP on defence, aims to further accelerate procurement and modernisation efforts, with officials instructed to rapidly prioritize speed in acquiring equipment. This initiative follows last year's plan to invest 190bn kroner in the military over the next decade.

RUSSIA CONDEMNS POSSIBLE NATO DEPLOYMENT IN UKRAINE



Russian Foreign Minister Sergey Lavrov stated on Tuesday (Feb 18) that any NATO troop deployment in Ukraine would be "completely unacceptable." Speaking at a press conference on the Ukraine talks, Lavrov noted that former U.S. President Donald Trump was the first Western leader to highlight NATO's role in escalating the conflict. He claimed Trump would have prevented Ukraine's NATO integration, calling it one of President Joe Biden's "biggest mistakes." Lavrov reiterated President Vladimir Putin's stance that NATO expansion and Ukraine's absorption into the alliance pose a direct threat to Russia's sovereignty and security.

CHINA CRITICIZES US TAIWAN STANCE



China has condemned the US for removing a key phrase from a government fact sheet that previously stated, "We do not support Taiwan independence." The revision, made by the US State Department, has been labelled by Beijing as a "grave backpedal" that threatens US-China relations. While Taiwan welcomed the change, viewing it as a sign of closer ties with Washington, concerns remain over the Biden-Trump policy shifts. Meanwhile, China has increased military activity near Taiwan, asserting its claim over the self-governing island. The move adds tension to an already strained US-China relationship.

IRAN SLAMS NETANYAHU'S WAR THREATS



Iran has strongly condemned Israeli Prime Minister Benjamin Netanyahu's remarks about "finishing the job" against Tehran, calling them a violation of international law. Speaking alongside US Secretary of State Marco Rubio, Netanyahu credited former President Trump's leadership in weakening Iran's "terror axis" and vowed further action against groups like Hamas and Hezbollah. Iran's Foreign Ministry dismissed the threats, insisting Israel "can't do a thing" against Tehran. Meanwhile, Saudi Arabia is reportedly mediating between the Trump administration and Iran for a new nuclear deal. Tensions continue as Trump reinstates his "maximum pressure" policy, escalating fears of regional conflict.

US-JAPAN CONDEMN CHINA'S SEA CLAIMS



The US and Japan have reaffirmed their stance against China's territorial claims in the South China Sea, calling them unlawful and provocative. Following a Washington meeting, President Donald Trump and Japanese PM Shigeru Ishiba criticized China's militarization in the region. Beijing responded by accusing the US and Japan of interfering in its internal affairs and escalating tensions. The dispute remains a global concern, with the US strengthening military ties with allies like the Philippines and Australia, while China continues naval drills with Russia.

FRANCE TO WITHDRAW TROOPS FROM SENEGAL



France and Senegal have agreed to establish a commission to oversee the withdrawal of French troops and transfer military bases by the end of 2025. This follows Senegalese President Bassirou Diomaye Faye's decision to remove the 350 stationed French soldiers, citing sovereignty concerns. France has already begun withdrawing troops, handing over three military bases. This move aligns with other African nations, including Mali, Niger, and Burkina Faso, that have severed defense ties with France. The withdrawal signifies a broader shift in West Africa's approach to foreign military presence.

MODI MEETS TRUMP IN WASHINGTON



Indian Prime Minister Narendra Modi visited Washington, DC, for a two-day visit at President Donald Trump's invitation. The visit focused on strengthening trade, defense, and counterterrorism ties. Modi was warmly welcomed by the Indian diaspora despite cold weather. His first high-profile meeting was with newly confirmed US Director of National Intelligence, Tulsi Gabbard. Besides his meeting with Trump, Modi's schedule included discussions on technology, energy, and supply chain resilience.

THE RISE OF RIGHT-WING IN EUROPE

INVESTIGATING

The political landscape in Europe has undergone a significant transformation – a trend observed particularly in the past two to three years, with right-wing political activity gaining prominence. There has been growing dissatisfaction among Europeans which, of late, has manifested into a polarised environment facilitating a fertile ground for right-wing ideologies to flourish, something that may well shape Europe's future.



**AMBASSADOR SRIKUMAR MENON, IFS (RETD)
FOR TNJ**

If one were to look back and analyse recent developments, the trigger for the emergence of a more vocal expression of right-wing politicking, can be traced to some key factors - like the European Union's weak handling of the migrant crisis, the harsh realities and downside of Brexit kicking-in, the spiralling costs of living. The last straw has been the unpopular austerity measures that several governments have reluctantly forced upon their citizens. The EU's obsession with the Russia-Ukraine conflict by pledging huge financial and defence resources to bail out Ukraine has only added to the despondency and economic frailties of ordinary Europeans.

The EU's response to the migrant crisis has often been described as "dis-jointed, politically divisive and ineffective", leading to political polarization. This appears to have given ammunition to political groups to whip up populist rhetoric, islamophobia and take a more hardline stance on immigration.

It is a fact that contentious issues and half-hearted attempts to rein in the migrants' challenge have brought into sharp focus, the disagreements between EU member states. These flashpoints of discord have negatively impacted EU policy decisions and goals - like the need to chart out a unified EU



strategy; uneven and skewed burden-sharing proposals; the lack of robust border security controls; and most importantly - addressing the human rights and humanitarian concerns.

The European Parliamentary elections held in June 2024, brought in its wake some stark and notable changes in the continent's political landscape. The European People's Party (EPP) led by Ursula von der Leyen (the current President of the European Commission) emerged as the winner, bagging the most seats (188) in the EP.

However, the group of pro-EU centrist, liberal, social democrat, and environmentalist green parties suffered major losses,

relations - as opposed to the EU's emphasis on multilateral cooperation.

From the EU perspective, the challenge in Parliament would be to contend with right-wing parties putting individual national interests over and above the need to forge EU unity - resulting in more fragmentation and diminished levels of cooperation among member states.

Most importantly, the 'restrictive immigration policies' advocated by right-wing parties could tend to create friction within the EU - leading to increased tensions and conflicts in perceptions as well as policy execution. Other areas likely to



while the euro-skeptic right-wing European Conservatives and Reformists group made significant gains. Reflecting the growing populist trend, another new right-wing group - Patriots for Europe cornered a significant share of 84 seats in the new EP.

This outcome of the EP elections, a trend-setter of sorts, reflects the shifting European political dynamics - an emerging political scenario marked by increasing polarisation, with right-wing populist parties grabbing the chance to make their presence felt and be counted in the European Parliament - thereby having a larger say in policy formulations.

be impacted by the emergence of right-wing groups are the prospect of dilution of environmental safeguards and a lesser emphasis on social security protections.

Of late several countries in Europe have witnessed a surge of right-wing populism - with parties capitalising on voter dissatisfaction and dominating the political narrative - be it in Italy, Austria, Germany, Hungary, Poland or the Netherlands.

Even other countries like Croatia, Czech Republic, Finland, Poland, Slovakia, Sweden et al... have seen a rise in right-wing

This shift in attitudes, resulting in polarisation and political fragmentation, has largely been due to economic instability, insecurity, terrorism, crime, immigration and national identity concerns.

POLITICAL IMPLICATIONS

Of course, such a change to the political fabric of the continent could have potential implications for the EU's stability, effectiveness, and credibility. Right-wing parties are traditionally known to favour 'an isolationist approach' towards international

popularity. Bowing to political compulsions, some ruling parties in power have had to make compromises to include far-right parties in their governments. These developments have caused unease among conservative and centrist parties - worrying about the possibility of authoritarian governance structures and fascist ideology again taking root in Europe.

The pro-European parties in the EP are under tremendous pressure to adapt to the dynamically changing political equations while striving to preserve the EU's relevance.

FLASH-POINTS IN EUROPE

In Italy, the "Brothers of Italy - Fratelli d'Italia (FdI)" - a far-right party with neo-fascist roots led by Giorgia Meloni, gained significant following and support to claim victory in the September 2022 Italian parliamentary elections. FdI continues to be the ruling party in power, leading the centre-right government for the third straight year, a rarity of sorts, given the history of short-survival spans of coalition governments in Italy.

In France, the National Rally Party (RN), led by Marine Le Pen has become a major force in French politics. (Marine Le Pen is the daughter of Jean-Marie Le Pen, the controversial far-right anti-immigrant politician). In July 2024, RN won the popular vote in the French National Assembly elections, securing 32.4% of the vote share. Though placed third, the outcome was a significant victory for RN, prompting some observers of French politics to term it as a 'worrisome and concerning' development.

In Austria, the far-right Freedom Party (FPÖ) gained 25.7% of Austria's vote in the June 2024 EP elections. The subsequent Austrian legislative elections held in September 2024, saw the FPÖ emerging as a dominant political entity - improving its support base by cornering 29.2% of the vote. This result was the best electoral performance in the party's history and came at the expense of traditionally dominant Austrian parties like the Conservatives and the Social Democrats.

In Hungary, the Fidesz right-wing and far-right populist national-conservative Hungarian party has been in power since 2010. Prime Minister Viktor Orbán and his party have courted controversy, time and again, for what critics term as their 'Eurosceptic, anti-democratic and anti-immigrant' stance.

In Poland, the Law and Justice (PiS) party, which headed a right-leaning united coalition in Poland between 2015 to 2023, has been a strong votary of nationalism, a strident



In Germany, The Alternative for Germany (AfD) party, which is avowedly Eurosceptic and anti-immigrant, has made substantial gains in recent times. During the June 2024 EP elections, AfD emerged as the second most popular party in Germany, after the ruling social democratic SPD party of Chancellor Olaf Scholz.

Earlier the AfD had won 94 seats in the 2017 German federal elections, while it performed strongly in the 2021 federal elections, capitalising and invoking the issue of economic inequality in its traditional turf in eastern Germany - emerging as the single largest party in the states of Saxony and Thuringia.

opponent of immigration and mildly euro-skeptic in approach. During its tenure, the PiS-led government had suspended the right to asylum - calling it a "bold new migration strategy" - a clear departure from established European principles. PiS has often been criticised for its policies that have been termed as 'anti-constitutional' and 'compromising judicial independence'. PiS had won 44% of the popular vote during the Parliamentary elections in 2019 - the largest vote share obtained by any party since 1990.

In the UK, The rise of right-wing politics in the United Kingdom, in recent years, can be attributed in part, to Brexit; growing



anti-immigration sentiment; economic insecurity, austerity and radicalisation. The situation in the UK got further exacerbated by a vitiated social environment, instigated by online social media and the toxic rhetoric of opportunist politicians in the UK, resulting in intolerance leading to some high-profile racist, hate crimes and anti-Semitic incidents. With the Labour Party coming to power in the last July 2024 elections, the UK appears to have, at least for the time being, bucked the right-wing upsurge, trending elsewhere in Europe.

In the Netherlands, the Dutch Party for Freedom (PVV) led by Geert Wilders has been the main driver of right-wing politics in the Netherlands for the past several years now. It has taken a strong anti-immigration stance, while also taking the lead in calling for a 'Nexit' (Netherlands' exit from the EU)- something that has touched the chords with a substantial section of Dutch voters.

The PVV has also taken an extreme stance on climate change policies, demanding the complete removal of existing environmental regulations and stepping up of oil and gas production. It appears that Netherlands is not yet ready for Wilders to form a right-wing coalition government on his own, though the signs are there for Wilders' PVV to play a crucial role in future coalition governments - something that would put the country on a collision course with EU's core values.

UNRAVELING AHEAD

The rise of right-wing groups in Europe has profound implications for both domestic and international politics. It

would indeed be fascinating to see how the scene in the European political firmament unravels in the coming months - given that several countries in the region are scheduled to hold crucial Parliamentary / Federal / Presidential elections in the coming months in 2025 - like Poland (May), Romania (May), Croatia (May), Czech Republic (May), Norway (September) and Switzerland (October).

Amidst the disruptions and changes to the structure of traditional political establishments, as witnessed recently around the world, including in the United States, there are significant challenges and uncertainties ahead for the European Parliament, the European Union and its member countries.

US President Trump's chaotic first few months in office could be seen as distractions but will be difficult to ignore for the European Governments, politicians, policymakers and citizens alike. They must rediscover their mojo to ride the storm and secure Europe's traditionally well-entrenched, resilient and inclusive democratic traditions.

As we look ahead, this indeed is an interesting and crucial phase for global geopolitics in general and Europe in particular. The continent buckles down to tackle the daunting challenges, while the rest of the world watches with a sense of unease, tempered with a mix of anticipation and quiet optimism.

*(Ambassador Srikumar Menon, IFS (Retd.), former Ambassador of India to South Sudan, Angola and Sao Tome & Principe. The views expressed are of the author and do not necessarily reflect the views of **The News Analytics Journal**.)*

DRC PLUNGES INTO FRESH CHAOS

TIMEPIECE

The Democratic Republic of Congo (DRC) is once again engulfed in violent conflict as the M23 rebel group advances in the eastern regions of the country. This resurgence of violence threatens the fragile stability of the DRC and has far-reaching implications for the broader Great Lakes region. This ongoing crisis has devastating human and economic impacts further complicated by the influence of external actors.



JUSTUS NAM, NAIROBI, KENYA
EXPERT ON INTERNATIONAL RELATIONS, COVERS AFRICA
FOR TNJ

The crisis in the DRC is deeply embedded in the region's complex history, particularly following the 1994 Rwandan Genocide. The mass displacement of Hutu refugees, including members of the Interahamwe militia responsible for the genocide, destabilized eastern DRC (then Zaire), setting the stage for the First (1996–1997) and Second (1998–2003) Congo Wars. The latter, often referred to as the "African World War," involved multiple African nations and left the country in perpetual turmoil.

The instability in the DRC is also linked to colonial legacies. The arbitrary borders drawn during the 1884 Berlin Conference

have fuelled ethnic conflicts, particularly in the Great Lakes region, where the Banyarwanda community, comprising both Hutus and Tutsis, remains at the centre of tensions. The question of citizenship and political inclusion for Kinyarwanda-speaking Congolese remains unresolved, perpetuating cycles of marginalization and violence. The first President of Tanzania Julius Nyerere once argued that, at the very least, Kinyarwanda-speaking nationals are Congolese whose civic rights must be firmly anchored within the Congolese polity. Additionally, there is a case for recognizing migrants forcibly relocated by Belgian colonial policies, such as those driven by manufactured famines to supply



labour. The unresolved nature of this issue has perpetuated cycles of exclusion and conflict.

M23 traces its roots to the National Congress for the Defense of the People (CNDP), a rebel group led by Laurent Nkunda that operated in eastern DRC during the mid-2000s. The CNDP was primarily composed of Tutsi fighters who claimed to be defending the rights of Kinyarwanda-speaking Congolese against government persecution and the threat of Hutu militias, particularly the Forces Démocratiques de Libération du Rwanda (FDLR). In 2009, a peace agreement between the CNDP and the Congolese

government led to the integration of its fighters into the Congolese army (FARDC). However, tensions persisted, and in 2012, a faction of ex-CNDP fighters mutinied, citing the government's failure to uphold the terms of the 2009 peace deal. This faction formed the March 23 Movement (M23), named after the date the peace agreement was signed.

M23 launched a rebellion against the Congolese government, swiftly capturing key territories, including Goma, in November 2012. The group was accused of committing war crimes, including mass killings and sexual violence, prompting widespread condemnation. International pressure, including UN-backed military intervention, forced M23 to retreat into Rwanda and Uganda by 2013. However, the group's resurgence in late 2021 signalled renewed geopolitical tensions between the DRC and Rwanda, with Kinshasa accusing Kigali of supporting the rebels, a charge Rwanda denies.

services such as healthcare and clean water. According to the Kivu Security Tracker, over 1,200 civilians were killed in 2022 alone, many at the hands of M23 fighters. Sexual violence remains rampant, and thousands of children have been forcibly recruited as child soldiers.

The economic impact is equally devastating. Despite the DRC's vast reserves of cobalt, copper, and coltan, ongoing violence has deterred investment and reduced GDP growth from 6.2% in 2021 to 4.5% by the end of 2024. The country's extractive industries, dominated by foreign corporations, suffer from illicit mining operations that fuel armed groups. Multinational corporations have been accused of profiting from the chaos while local communities remain impoverished. This phenomenon, often referred to as the "resource curse," has made the DRC's natural wealth a source of suffering rather than prosperity.



THE TOLL OF CONFLICT

On January 27, 2024, M23 forces captured Goma, the capital of North Kivu, marking a significant escalation since the collapse of peace talks under the Luanda and Nairobi processes. The group's subsequent advance towards Bukavu in South Kivu has heightened fears of further instability, with devastating humanitarian and civilian consequences.

The toll of the ongoing violence is catastrophic. As of 2023, the DRC has one of the highest numbers of internally displaced persons (IDPs) in the world, with over 5.6 million people forced to flee their homes. The eastern provinces—North Kivu, South Kivu, and Ituri—are the hardest hit, where millions face food insecurity and lack access to basic

GLOBAL RESPONSES

In an effort to stabilise the country, regional and international diplomatic initiatives have been launched. The Nairobi Process, introduced in 2022 by the East African Community (EAC), sought to foster dialogue, disarmament, and military integration. However, key actors, including the M23, remain outside the talks due to unresolved grievances and deep-seated distrust. The deployment of a regional force in 2023 has also yielded limited results, with M23 continuing to make territorial gains. Kenya's withdrawal from the force in 2023 further weakened the initiative's credibility.

Similarly, the Luanda Process, mediated by Angola, aimed to de-escalate tensions between the DRC and Rwanda, which is widely accused of backing M23, a claim supported

The Nairobi and Luanda talks remain ineffective as trust erodes between conflicting parties and regional mediators.

by UN reports but denied by Kigali. However, a ceasefire agreement brokered in 2022 quickly collapsed, highlighting the fragility of diplomatic solutions in the absence of trust and accountability.

The United Nations peacekeeping mission, MONUSCO, has been present in the DRC for over two decades, with an annual budget exceeding \$1 billion. Despite its substantial resources, MONUSCO has struggled to contain armed groups, leading to public frustration. Many Congolese view MONUSCO as ineffective, and protests against the mission have erupted in multiple cities.

THE FIRST JOINT EAC-SADC SUMMIT

On 8th February 2025, the first-ever joint summit of the East African Community (EAC) and the Southern African Development Community (SADC) was convened in Dar es Salaam, Tanzania, to address the escalating crisis in Eastern DRC. The summit brought together leaders from

Reinvigoration of the Nairobi and Luanda Processes: The leaders reaffirmed their commitment to the Nairobi and Luanda processes, emphasizing the need for inclusive dialogue involving all stakeholders, including M23, to address the root causes of the conflict.

Deployment of a Joint EAC-SADC Force: The summit approved the deployment of a joint regional force to replace the existing EAC Regional Force and SADC Mission in the DRC (SAMIDRC). This unified force is tasked with neutralizing armed groups, protecting civilians, and facilitating the disarmament, demobilization, and reintegration (DDR) of combatants.

The communiqué condemned external interference in the DRC's internal affairs, particularly the alleged support for M23 by neighbouring countries. It called for an independent investigation into these allegations and urged all parties to respect the sovereignty and territorial integrity of the DRC.



both regional blocs, including DRC President Félix Tshisekedi, who attended virtually, and Rwandan President Paul Kagame, marking a significant step toward harmonizing regional approaches to the conflict.

The communiqué issued at the end of the summit outlined several key resolutions:

Immediate Ceasefire and Humanitarian Access: The summit called for an immediate cessation of hostilities by all armed groups, including M23, and urged the opening of humanitarian corridors to allow aid agencies to reach affected populations.

Recognising the link between economic instability and conflict, the summit pledged to accelerate regional economic integration initiatives, including infrastructure development and cross-border trade, to create sustainable livelihoods and reduce the incentives for armed rebellion.

While the summit's resolutions represent a promising step forward, significant challenges remain. The differing approaches of the EAC and SADC, as well as the deep-seated mistrust between the DRC and Rwanda, continue to complicate efforts to achieve lasting peace. Moreover, the success of the joint regional force will depend on adequate funding, logistical support, and the cooperation of all parties involved.



The DRC's mineral wealth fuels conflict rather than prosperity, with foreign interests exploiting instability while civilians bear the brunt of war.

SUSTAINABLE PEACE

Resolving the DRC's conflict requires a multi-faceted approach that goes beyond diplomatic talks. Several critical steps must be taken to achieve lasting peace.

A Durable Ceasefire: A lasting ceasefire must be enforced with strong verification mechanisms to ensure compliance. This includes deploying regional and international monitoring teams to oversee ceasefire adherence and prevent further escalations.

Complete, Permanent, and Verifiable Disarmament: A systematic disarmament, demobilization, and reintegration (DDR) program must be implemented, backed by regional actors and international bodies.

Legal Clarity for Kinyarwanda-Speaking Congolese: The issue of citizenship for Kinyarwanda-speaking Congolese must be resolved through legal frameworks that provide clear protections and rights.

Regional Security Guarantees: Ensuring respect for sovereignty requires a regional security compact enforced by the EAC, the AU, and the SADC.

Ethical Sourcing of Minerals: A globally enforced certification mechanism must be implemented to track and regulate mineral exports, reducing illegal exploitation and conflict financing.

Regional Economic Cooperation: Strengthening regional trade, improving infrastructure, and establishing shared economic zones can reduce the incentives for armed rebellion.

The path to peace in the DRC will be neither quick nor easy. However, without bold and sustained action, the cycle of violence will persist. A collective commitment from the Congolese government, regional stakeholders within Africa, and the international community is essential to achieving lasting stability and prosperity for the DRC and its people. Only through coordinated efforts can the country move beyond its history of conflict and toward a future of peace and development.

(Justus Nam is an expert on Africa. He is an international relations specialist from Nairobi, Kenya. The views expressed are of the author and do not necessarily reflect the views of The News Analytics Journal.)

GLOBAL EVENTS



Counter UAS Technology Europe 2025: The 3rd Annual Counter UAS Technology Europe Conference, hosted by SAE Media Group, will take place in London from 1 – 3 April 2025. As the proliferation of drones and unmanned aerial systems (UAS) continues to grow, this event provides a critical platform for European armed forces, security agencies, and industry leaders to address emerging challenges and explore cutting-edge solutions.

The European Counter UAS market is rapidly expanding, with new programs and initiatives aimed at safeguarding critical national infrastructure and protecting deployed personnel abroad. Counter UAS Technology Europe 2025 will showcase the latest innovations to counter drone threats, ensuring the safety of European personnel, equipment, and infrastructure.

Official site: <https://www.smgconferences.com/defence/uk/conference/counter-uas-europe>



Sea-Air-Space 2025: The Sea-Air-Space 2025 event will take place in Washington DC, USA from 6 – 9 April 2025. Powered by the Navy League of the United States, Sea-Air-Space stands as the premier maritime exposition in the U.S. This event unites defense industry leaders and top military decision-makers from around the globe to share and explore the latest advancements in the maritime domain.

Featuring industry-leading speakers and events over three impactful days, Sea-Air-Space is an essential gathering for anyone committed to the future of U.S. maritime strength and innovation. It offers an unparalleled opportunity to engage with key players and stay at the forefront of maritime technology and strategy.

Official site: <https://seaairspace.org/>



AIAA Defense and Security Forum 2025 : The AIAA Defense and Security Forum (AIAA DEFENSE Forum) is scheduled from 15 -18 April 2025 at Laurel, USA. It is a Secret/ NOFORN event dedicated to discussing strategic, programmatic, and technical topics, as well as policy issues relevant to the aerospace and defence community. This year's theme will explore how the science and technology community, systems developers and operators address operational needs through rapid innovation and deployment. By enhancing capacity, efficiency, and readiness, this approach enables war-fighters to adapt to dynamic conditions and maintain a tactical advantage.

Official site: <https://www.aiaa.org/defense>

AHEAD



Cyber Security Asia 2025 : The Cyber Security Asia 2025, will be taking place from 21 – 22 April 2025, at Kuala Lumpur, Malaysia. This premier event will gather top experts and practitioners for in-depth talks and exclusive networking opportunities, making it a key platform for developing partnerships and strategies, and showcasing the latest technologies that ensure the safety and security of governments, industries, and individuals.

As cyber-attacks become increasingly frequent, sophisticated and damaging, Cyber Security Asia 2025 stands as a leading forum for sharing innovative strategies, best practices, and emerging technologies in cyber defense. The conference will address critical topics such as strengthening critical infrastructure against cyber warfare, protecting IoT devices from security threats, and developing next-generation security solutions. *Official site* : <https://cybersecurityasia.tech/>



Africa Airforce Forum 2025 : Building on the success of its previous editions, the 4th African Air Forces Forum will be held on April 22-23, 2025, in Abuja, Nigeria. This event, hosted by the Nigerian Air Force (NAF), aims to advance air force capabilities and foster bilateral partnerships across Africa.

Following the grand celebration of the NAF's 60th anniversary and the successful 3rd African Air Forces Forum in May 2024, this year's forum will continue to attract high-profile dignitaries, including Africa's key Air Force Chiefs, top leadership, international and regional experts, government officials, and defense stakeholders.

The forum will focus on key strategies and solutions to ensure national security and contribute to peacekeeping missions both regionally and globally. It will feature a variety of discussions on the prospects of air power in Africa, its impact on internal security operations, counter-terrorism efforts, and the latest key technologies.

Official site: <https://airforceafrica.com/>



IMDEX Asia 2025 : IMDEX Asia is scheduled from 6 – 8 May 2025 at Changi Exhibition Centre, Singapore. It is the premier naval and maritime defense event in Asia and has consistently gathered the world's naval elite and showcased the latest maritime innovations. Since its debut in 1997, this leading exhibition has become a cornerstone for the industry, providing a platform for businesses to unveil cutting-edge vessels, systems, and technologies. With its established conferences and live discussions on maritime security, IMDEX Asia continues to attract global leaders and distinguished guests, solidifying its reputation as a must-attend event for the maritime defense community.

Official site: <https://www.imdexasia.com/>

TRUMP'S CHIP DREAM BECOMES TAIWAN'S NIGHTMARE

ECOSYSTEM

Donald Trump's new stance on Taiwan signals an aggressive policy shift that could reshape the global semiconductor landscape. Once a campaign talking point, his proposal to impose steep tariffs on Taiwan-made chips aims to force TSMC to shift production stateside. Such measures risk upending supply chains, inflating consumer costs and may erode Taiwan's silicon shield, ultimately transforming Trump's chip dream into a strategic nightmare for Taiwan.



KEONI EVERINGTON. TAIPEI, TAIWAN

TAIWAN & CHINA CORRESPONDENT, THE NEWS ANALYTICS JOURNAL

Based on his rhetoric on Taiwan on the campaign trail and after the election, Trump is making a sharp departure from his previous term. His trade policy toward Taiwan will have potentially detrimental and dangerous consequences.

While on the campaign trail, Trump accused Taiwan of stealing America's chip business. What has apparently made Taiwan a target is the fact that Taiwan, primarily TSMC makes over 90% of the world's most advanced chips.

In Trump's mercantilist mind, Taiwan is "taking advantage" of the US by enjoying a trade surplus of over US\$80 billion. His strategy to balance the trade relationship with Taiwan was clear on the campaign trail.

TRADE AMBITIONS

During an interview with Joe Rogan, he criticised the CHIPS Act because he felt it was unnecessary to help fund TSMC's massive semiconductor fabrication (fab) investments in



Arizona when they could be instead incentivised through tariffs. Demonstrating his lack of knowledge of the subject, he oversimplified the industry and compared the import of chips to the import of cars.

By pointing out that the US could impose tariffs of 100% to 200% on cars, the same percentage could be imposed on chips made in Taiwan. What Trump fails to realise is that semiconductors are not necessarily imported en masse but rather often come to the US in much more complex products such as smartphones, servers and automotive electronics.

Trump believes that if he imposes such high tariffs on Taiwan-made chips, it will force firms such as TSMC to move all of their plants to the US. This neglects the fact that tariffs will immediately be passed on to American consumers who will find all products that contain TSMC

board of directors meeting in the US on Feb 12. The company did not publicly announce further US expansion plans but there are rumours that to appease Trump TSMC could accelerate the timeline for bringing advanced production to its Arizona fab facility, commit to additional investments in the US, or build advanced packaging capabilities in the US.

On Feb 13, Trump again accused Taiwan of taking the chip business away from the US. Indicating that a pressure campaign has begun, Trump said he wants the chip business to return to the US.

News broke on Feb 14 that the Trump administration is pushing TSMC into forming a joint venture with Intel. This has raised fears in Taiwan that this would lead to a large-scale handover of TSMC's intellectual property to its American partner.



chips substantially more expensive, thus raising the inflation he threatened to lower.

Like other Asian Tigers, Taiwan can cancel out some of the cost of the tariffs by devaluing the New Taiwan dollar. Taiwanese companies can also work to lower costs by increasing automation or moving production to other countries with even lower production costs and are not subject to such high tariffs as Vietnam or India.

TARIFF THREATS

Just a week into his second term on Jan 27, Trump threw out the possibility of 25% to 100% tariffs on Taiwan-made chips. He also aimed at the CHIPS Act and ominously said that Taiwan companies will need to build new facilities in the US with their funds.

Amid rising pressure from Trump, TSMC held its first-ever

US tariffs may force TSMC to relocate, endangering Taiwan's market dominance while straining US consumer budgets and hindering global technological progress amid trade tensions significantly.

SILICON SHIELD

The fact that 65% of the world's semiconductors are made in Taiwan and 90% of the most advanced ones has given the country, what has been dubbed, the 'silicon shield'. The concept is that because so much of the world's chip production is based in Taiwan, the US and other Western powers will do everything they can to protect it from a Chinese invasion.

When TSMC first announced the building of a chip-making

plant in Arizona in 2020, there were concerns in Taiwan that this would weaken the silicon shield. Worries over the loss of the shield have only further worsened as TSMC increased the number of planned plants to three.

The fear in Taiwan is that if too many of TSMC's key facilities are moved to the US and too much technology is handed over to US competitors, the country will be seen as less worthy of defending itself from a Chinese invasion.

In 2022, TSMC founder Morris Chang said that these efforts by the US to restore chip production are futile because the country lacks manufacturing talent. He also pointed out that the costs of producing chips in the US will be 50% higher than in Taiwan.

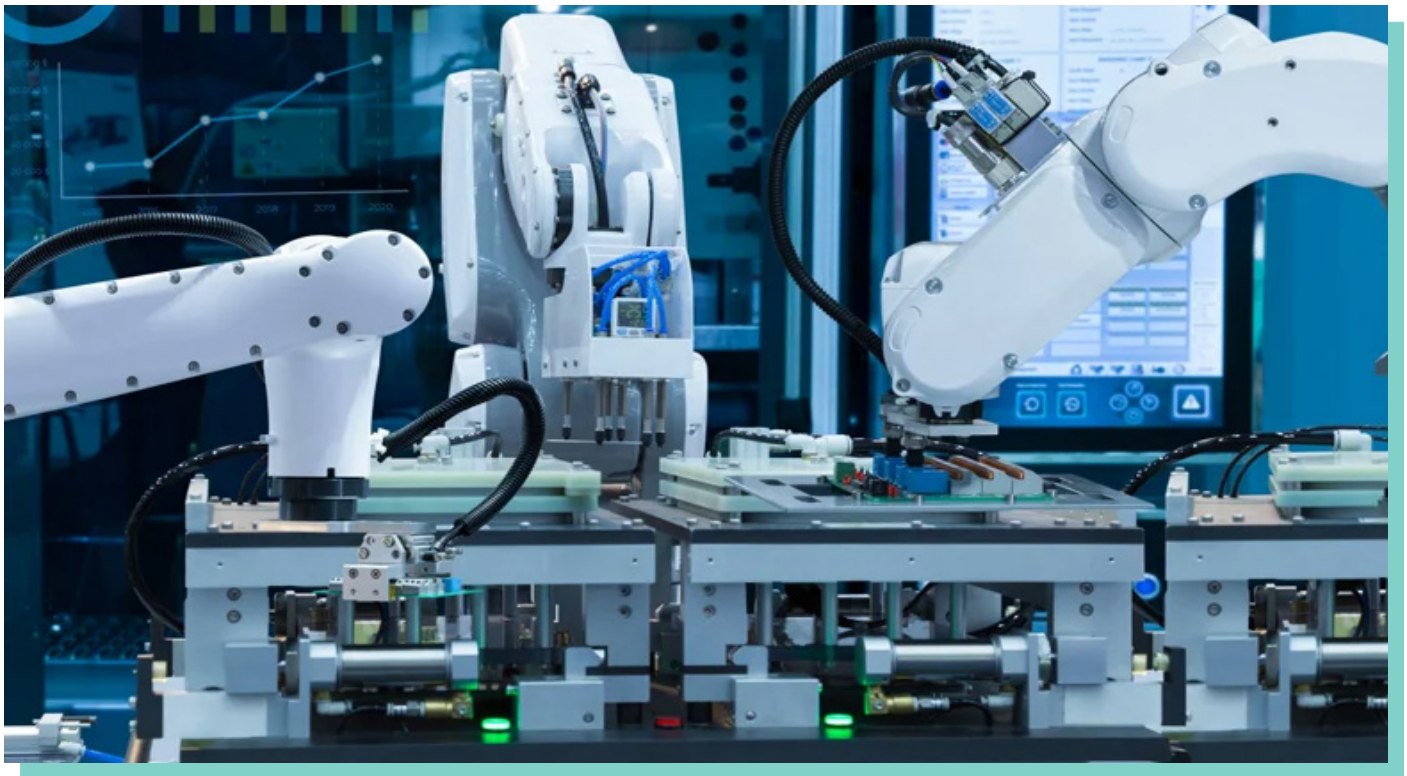
Chang also said it will take many years to build a significant chip manufacturing base in the US. TSMC's first fab facility is set to begin production this year, four years after ground was first broken at the site, while the second fab facility will not go online until 2028 and the third by the end of the decade, after Trump's second term ends.

What does not understand is that Taiwan did not "steal" the chip business from the US. What TSMC does, is it makes chips designed by American companies such as Apple, Nvidia, Qualcomm, and AMD.

These companies gladly outsourced the production of semiconductors to TSMC because it spared them the cost of building the fab facilities and hiring the workers and lowered the cost of the chips. By not having these expenses and having access to a steady supply of low-cost chips, these American companies can sell their products to consumers for a lower price and higher profit margin.

Because costs with everything, especially labour, are far higher in the US, the burden TSMC must bear to produce the chips in Arizona will be passed on to its US clients. Firms such as Apple will then have to pass the higher price of the chips on to the consumer, contributing to inflation, the very thing Trump vowed to bring down.

TSMC will be hard-pressed to fulfil Trump's dream of moving all semiconductor production to the US, because



US DILEMMAS

What Trump fails to understand is the vast sums of money and years it takes to build one fab facility. TSMC's initial investment in the first Arizona plant was US\$12 billion, but it rose to US\$40 billion when the second fab facility was announced, and now US\$65 billion when accounting for the third one.

Beyond the exorbitant cost and time needed to build semiconductor plants, the fundamental issue that Trump

of the vast expense of building such facilities in the US. He is not helping things by appearing to be less generous with US government funding and incentives, other than tariffs on Taiwan-made chips.

Shifts in TSMC's production strategy could unsettle global semiconductor markets, potentially weakening the delicate balance of innovation, supply stability, and competitive advantage worldwide.



GLOBAL CHIP SUPPLY

TSMC also has to consider its customers in the rest of the world, which will not be willing to pay such the greatly inflated prices seen in the US. Therefore, the firm will have to keep some fab facilities in Taiwan and build facilities in other major countries to serve those markets.

By continually pressing TSMC to invest more of its own money into US plants and sell chips at a higher cost, it makes itself vulnerable to China's cheaper, state-supported competitors. Over time, TSMC's profit margins could drop and its ability to develop cutting-edge chips slowed, giving Chinese firms a chance to close the gap in the rest of the world outside of the US.

To stay competitive, it will be highly tempting for US companies to purchase chips from TSMC's competitors that are not forced to set up factories in the US, such as Samsung.

To help maintain its edge and as a consequence, Taiwan's silicon shield, TSMC is not building the most advanced semiconductors in the US, the 3 nm process, with the 2 nm slated for this year. Meanwhile, the Arizona fab facility is making relatively older 4 nm chips.

The danger is that Trump deems TSMC's technology handover sufficient to meet US chip supply needs. But nothing could be further from the case.

TSMC's first fab facility will not begin production until the first half of this year. Therefore, at the moment, the US is still completely reliant on TSMC's Taiwan-based plants for

all of its advanced chips.

The worry now in Taiwan is that in the coming years as TSMC ramps up its chip production in the US, Trump will see the country's value decrease, diminishing its silicon shield.


Trump's perception of Taiwan is also greatly imperilled by his 'top advisor' Mr Elon Musk. In 2023, Musk parroted the Chinese Communist Party narrative that Taiwan is an "integral part of China, that is arbitrarily not part of China."

With Musk's gigafactory in Shanghai and over 36% of Tesla sales coming from China last year, Musk has billions of dollars invested in and riding on China. Given Musk's constant presence in Trump's inner circle, it is probable that he will convince the president to take a stance on Taiwan that is increasingly ambivalent if not overtly in favour of Beijing's narrative.

The combination of the weakening of Taiwan's silicon shield and the influence of mercenary figures such as Musk could cause Trump to lose interest in Taiwan and tempt him into using the country as a pawn in part of a big deal with Beijing.

*(Keoni Everington is an American senior journalist based in Taipei, Taiwan with 15 years of experience covering news about Taiwan and China. Everington specialises in subjects such as cross-strait relations, US-Taiwan ties and international geopolitics. The views expressed by the author do not necessarily reflect the views of **The News Analytics Journal**.)*

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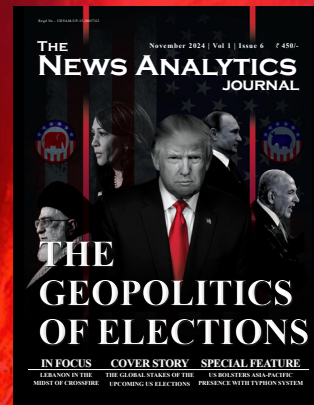
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