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STRATEGIC FAULT LINES

IN FOCUS
BEHIND WASHINGTON'S 'DRUG WAR' IN VENEZUELA

BIG STORY
INDIA'S EASTERN ARC: A NEW STRATEGIC FLASHPOINT

HI-TECH
ZERO-DAY MARKETS AND AUTONOMOUS CYBER WEAPONS

THE POWER PANEL



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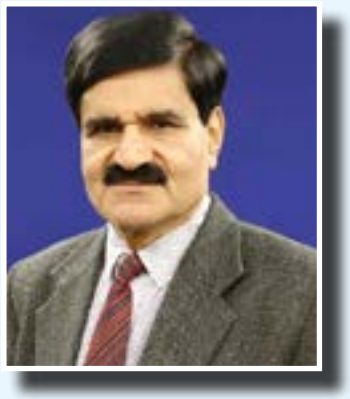


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FOREWORD



GREAT POWER RIVALRY AND THE END OF STRATEGIC STABILITY

The post–Cold War illusion of a stable, rules-based international order is rapidly dissolving. The world is no longer unipolar or neatly bipolar; it is volatile, multipolar, and increasingly unstable. Four intertwined forces—global volatility, great power rivalry, regional insecurity, and resource competition—are redefining national power and eroding the foundations of global stability.

At the core of this transformation is the return of hard geopolitics. Strategic rivalry among the United States, China, and Russia has shifted global politics from cooperation to competition. Military capability, technological dominance, and economic leverage now outweigh multilateral norms or moral authority. Power is measured less by diplomatic persuasion and more by control over supply chains, digital infrastructure, and strategic chokepoints—from semiconductor manufacturing to sea lanes.

Regional insecurity is deepening as conflicts in Ukraine, the Middle East, and the Indo-Pacific merge into arenas of proxy rivalry and strategic signalling. Grey-zone tactics erode global institutions and constrain smaller states. Simultaneously, competition over energy, minerals, food, and water—intensified by climate change—is weaponising supply chains and reshaping alliances worldwide.

This edition of The News Analytics Herald underscores that this multipolar world is not inherently more dangerous, but it is far less predictable. Stability will depend on pragmatic diplomacy, resilient economies, and adaptive global institutions. The old hegemony is gone. The emerging order rewards adaptability over dominance—and failure to adjust risks will only deeepen volatility and cascading crises.

Prof. Subhash Dhuliya
Former Vice Chancellor,
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ABOUT US

The News Analytics Herald is a premier national news magazine dedicated to analysing global developments that shape India's geostrategic landscape. From shifting currents in international relations and geoeconomics to emerging security challenges and transformative military technologies, we provide sharp, contextual insights into the issues that matter most. Guided by a commitment to factual depth and clarity, our analyses offer fresh perspectives on complex debates authored by an esteemed panel of global scholars, diplomats, armed forces veterans, international correspondents, and leading academics. Covering critical domains of diplomacy, defence, and military technology, the magazine brings a distinctly global and scholarly perspective to complex events. Each article is crafted to engage decision-makers, industry leaders, and globally aware readers alike.

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EDITOR'S NOTE



STRATEGIC FAULT LINES

As we begin a new year, I extend warm wishes to all our esteemed readers and partners. May 2025 bring clarity, stability, and renewed purpose in a world shifting rapidly underneath.

This Edition of The News Analytics Herald reflects upon the geopolitical, economic and technological fractures defining our times. Around us, multiple pressure points are intensifying simultaneously, reshaping national strategies and recasting global power balances.

In this issue, we examine the deepening realignments in Eurasia as Russia assumes chairmanship of the CSTO amid internal discord and external pressure. We analyse the fragile India–Myanmar–Bangladesh security arc, where insurgency spillovers, unstable borders, and external power penetration threaten regional equilibrium. Our military affairs section dissects the United States' shift toward distributed operations in the Indo-Pacific—an evolution with far-reaching implications for deterrence and escalation dynamics.

Equally important are the silent battles unfolding beneath these headline developments. We assess the global contest for critical minerals, where processing, not mining, determines strategic advantage, and explore hydropolitics, as transboundary rivers become theatres of contention amidst rising scarcity. The edition also highlights how climate change is accelerating geopolitical volatility, altering military planning, and reshaping risk landscapes for nations like India.

Jai Hind!



Sandhya Srivastava
Editor-in-Chief &
Publisher

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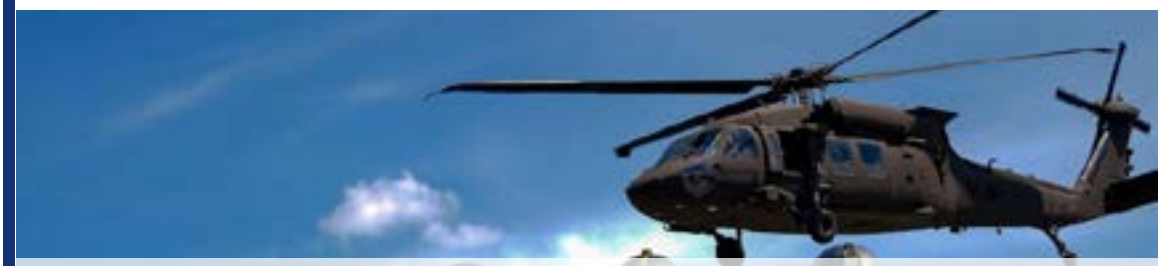
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BEHIND WASHINGTON'S 'DRUG WAR' IN VENEZUELA

IN FOCUS

Washington is tightening a military stranglehold around Venezuela under the guise of a "drug war", but the real battle is for oil, minerals and control of Latin America's strategic future. As Trump revives the Monroe Doctrine to push China, Russia and Iran out of the hemisphere, the Caribbean faces a manufactured crisis with potentially far-reaching consequences.



RICARDO MARTINS | CURITIBA, BRAZIL
LATIN AMERICA CORRESPONDENT, NEWS ANALYTICS

Why has Venezuela become the newest flashpoint in Trump's foreign policy agenda? The answer begins where it often does in geopolitics: natural resources and geography. Venezuela sits atop the largest proven oil reserves on the planet — roughly 17–18% of global reserves, more than Saudi Arabia. Add to that significant deposits of gold and strategic minerals, and the country becomes irresistible to any administration seeking to reassert U.S. dominance over the Western Hemisphere.

That ambition dovetails neatly with a revived Monroe Doctrine, rebranded in Washington as a necessary defence of the Americas against "hostile foreign penetration", meaning China, Russia and, to a lesser extent, Iran. Trump and his allies claim Venezuela represents a security threat, but the evidence points instead to an attempt to push back great-power rivals and secure control of vital resources. The Pentagon's build-up in the Caribbean, described by some analysts as a blockade, reflects the logic of great-power politics: keep rivals out and strategic assets in.

The geopolitical alliances of Caracas have undeniably triggered Washington's anxiety. Russia supplies Venezuela with weaponry, air-defence systems and military advisers. China bankrolls infrastructure, buys discounted oil and views Venezuela as part of a larger Latin American industrial corridor. Iran is involved in drone production and fuel cooperation. For Trump's hawkish circle, this constellation is intolerable: the Western Hemisphere must remain America's "backyard", as the Monroe Doctrine insists.

No one embodies this ideological fervour more than Marco Rubio, the U.S. Secretary of State, one of the hard-line and doctrinaire figures shaping American foreign policy. Himself the child of a Cuban exile community deeply committed to overturning leftist governments, Rubio approaches Venezuela not as a diplomatic challenge but as a crusade.

This is no 'drug war'—it is a geoeconomic battle for oil, influence and the future of the Western Hemisphere.



ALL FOR REGIME CHANGE?

Trump's preferred solution to the "Venezuela problem" is straightforward: regime change. The offer made to Nicolás Maduro, $50 million in exchange for stepping down and accepting asylum for himself and his circle, reads less like diplomacy and more like a bounty. The chosen successor, in Washington's eyes, is María Corina Machado, a staunch liberal determined to dismantle the Bolivarian socialist architecture and willing to open the country's oil and minerals for American companies' exploitation.



Maduro has, unsurprisingly, rejected this scenario. He is willing to negotiate his departure only if a trusted ally, one of his ministers, remains in power to preserve at least a fragment of the Bolivarian legacy. For him, accepting Machado would mean the total collapse of what Chávez built.

Underlying this political drama is a struggle for control of PDVSA, Venezuela's public oil company. Long plagued by elite factions and inefficiency, PDVSA still holds the keys to the world's largest reserves. Historically, much of its leadership was self-interested and even relocated to Florida after Chávez's Bolivarian reforms, where they became sources of anti-Chavista narratives.

But regime change is not only about Venezuela. Washington's strategy extends across Latin America: weakening leftist governments in Colombia and Brazil, undermining President Petro, and supporting right-wing candidates aligned with U.S. geopolitical priorities. This is consistent with past interventions, from support for coups to the subtle influence of U.S.-funded NGOs and politically connected private foundations. The pattern is clear: reshape the region politically, isolate China, and reclaim lost influence.

Venezuela may not stop an air assault, but even the risk of damaging a US carrier changes everything.

THE "DRUG WAR" PRETEXT

The U.S. has now deployed one of the largest military buildups in the Caribbean since the 1962 Cuban Missile Crisis. The USS Gerald R. Ford, the world's largest aircraft carrier, leads a flotilla of ten naval vessels; while the embarked complement aboard those ships may total some 12,000–15,000, there are many thousands more ashore in Puerto Rico, the U.S. Virgin Islands and regional allies such as the Dominican Republic and Trinidad and Tobago, 15 km away from Venezuela's coast, ready to pressure or attack Venezuela.

The official justification is a renewed "war on narco-trafficking", but this narrative has unravelled quickly. Venezuelan fishing boats, poorly equipped and physically incapable of travelling the 2,000 miles needed to reach U.S. shores, have been bombed, with more than 80 people killed. Independent investigations found no evidence that these small craft were carrying drugs. Even Tucker Carlson and Rand Paul have publicly challenged the administration's claims, pointing out that the major narcotics flows affecting the U.S. do not originate in Venezuela.

Latin America is unconvinced as well. Even governments that refuse to recognise Maduro's last election — such as



Colombia or Brazil — strongly oppose a U.S. military intervention. The region has no appetite for a new chapter of American imperial adventure.

The political cost of a full-scale invasion would be immense. Trump campaigned as a "peace candidate", and polls indicate that around two-thirds of Americans oppose a new war in Latin America. The risks are equally clear: Venezuela's defence strategy, explicitly inspired by Ho Chi Minh's Vietnam "people's war" doctrine, combines its professional army of around 400,000 troops, the Bolivarian Guard, with a vast militia network: 4 million armed civilians already trained, with 5 million more in preparation.

For Washington, the human and political cost of "boots on the ground" could be catastrophic, and the Vietnam spectrum is still present.

MOSCOW'S SHADOW

If Trump were to escalate militarily, he would face a landscape far more hostile than hawks in Washington admit. Venezuela's

armed forces remain deeply embedded in the Bolivarian project. All senior generals are loyalists. The country possesses Russian Sukhoi fighter jets, Buk anti-aircraft systems, Chinese drones and Iranian-assisted UAV production, and ongoing military cooperation with Moscow.



Several hundred Russian personnel, including at least one general, are reported to be in Venezuela, training local forces in drone warfare and missile operations. With the recent Russia–Venezuela strategic partnership treaty, Moscow has signalled it may supply even more advanced missile systems.

This does not mean Venezuela could stop a U.S. aerial assault. It cannot. But it can inflict considerable losses, especially at sea. Even the theoretical risk of damaging a U.S. carrier raises the strategic stakes dramatically.

Contrary to Washington's expectation, the Venezuelan public has not risen against Maduro despite widespread hardship. If he were truly the tyrant and narco-kingpin the Trump administration portrays, why would he dare arm millions of citizens? And why have they not turned their weapons against him?

The answer likely lies in a mixture of nationalism, political identity, and a deep-seated suspicion of foreign intervention, especially by the United States.

BEYOND VENEZUELA

The underlying driver of this entire crisis is not drugs, democracy or humanitarian concern. It is a geoeconomic rivalry. Trump is desperate to curtail China's expanding footprint in Latin America, where Beijing is financing ports, railways, electrical grids, telecoms and industrial projects that the United States can no longer match — even at home. For Washington, pushing China out of what it sees as its "strategic backyard" is a top priority. For Latin America, however, this pressure risks severing the region from its own development path.

Another dimension often overlooked is the Israeli factor. María Corina Machado has openly promised that, if she came to power through U.S.-assisted "liberation", her first act would be to relocate the Venezuelan embassy from Tel Aviv to Jerusalem. Israeli officials, for their part, have accused Venezuela of hosting Hezbollah operatives. This narrative provides yet another pretext for hardliners in Washington to push for confrontation, even though no evidence has been publicly offered.

In the beginning, American media largely repeated the official narrative. However, as the scale of the military build-up became visible, alongside the killing of innocent fishermen in violation of international law and the Humanitarian Convention, the risk of mass casualties in the event of a U.S. invasion of Venezuela, and the increasingly obvious economic motives, mainstream outlets have shifted their tone. They are now highlighting these issues and calling for criminal responsibility for Pete Hegseth, the Secretary of War, and others in the chain of command implicated in the unlawful killings in the region.

To make matters worse, Trump himself undermines the anti-narcotics narrative: he recently pardoned the convicted Honduran former president, a narco-trafficker, exposing the selective nature of his outrage.



What is unfolding in the Caribbean is not diplomacy, but an empire trying to reassert itself through force.

A DANGEROUS GAMBLE

The ongoing encirclement of Venezuela is not simply a regional dispute. It is a high-stakes confrontation in a moment of global systemic transition. Russia and China see Venezuela as part of a wider challenge to U.S. dominance; Washington sees Venezuelan oil and geography as essential to reasserting hegemony.

A direct U.S. invasion remains unlikely, given the political cost at home and the heavy casualties it would likely entail, similar to Vietnam. The more realistic scenario is a



prolonged siege: imposing a no-fly zone, targeted strikes, covert operations, as the recent PDVSA refinery fire, attempted assassination plots, diplomatic pressure and economic strangulation, all designed to force Maduro out without triggering a regional war.

But the risks are real. A miscalculation at sea, a drone strike gone wrong, or a collapse of Venezuelan social order could trigger a wider conflict. Latin America wants peace; Washington wants obedience; and the Venezuelan people, already exhausted, may end up paying the highest price.

Now it is clear to all that this is a "drug war" farce. Venezuela's tiny role in narcotics trafficking is well known. So, what is unfolding in the Caribbean is not an anti-drug operation but a geopolitical power play: an empire attempting to reassert itself through force rather than diplomacy.

A declining power can be more dangerous than a confident one. And today, Venezuela stands at the centre of that dangerous transition.



(Ricardo Martins. PhD in Sociology, specialising in international relations, geopolitics, and Latin American politics. He recently completed his postdoctoral fellowship at Utrecht University in the Netherlands and covers major developments in Latin America for News Analytics. The views expressed are of the author and do not necessarily reflect the views of ***The News Analytics Herald.****)*

QUICK INSIGHTS

- ***Venezuela's vast oil and minerals drive Washington's renewed Monroe Doctrine strategy.***
- ***Regime change push centres on PDVSA control and installing a pro-US leadership.***
- ***Caribbean militarisation masks a deeply questionable anti-narcotics narrative.***
- ***Venezuela's armed forces, militias and Russian backing raise invasion costs sharply.***
- ***China's regional footprint and the Israel factor widen the confrontation's geopolitical stakes.***



INDIA'S EASTERN ARC: A NEW

BIG STORY

India's eastern frontier with Myanmar and Bangladesh is fast transforming into South Asia's most fragile security corridor. Coup-driven collapse in Myanmar, political uncertainty in Dhaka, reviving insurgencies, and deepening Chinese and Western strategic competition are converging to reshape this volatile arc. Its trajectory will define the Northeast's stability, India's regional influence, and the Bay of Bengal's geopolitical balance.



AMBASSADOR SUSHIL KUMAR SINGHAL, IFS (R)
FOR **NEWS ANALYTICS**

The eastern frontier linking India, Myanmar, and Bangladesh has quietly evolved into one of South Asia's most volatile geopolitical theatres. The fragility stems from geographical porosity, ethnic cross-border continuities, insurgency ecosystems, and illicit economic networks. Myanmar's post-2021 military coup has accelerated governance collapse along the border.

Simultaneously, the political transition in Bangladesh to an interim government has introduced ambiguity into India–Bangladesh security co-operation. This security arc is becoming a frontline that will determine the stability of India's Northeast, the future of geopolitical alignment of Bangladesh, and the balance of influence between India, China and the United States. Ignoring this arc is no longer a luxury; it is a strategic risk.

This arc is no longer a peripheral border problem—it is becoming the decisive theatre shaping India's eastern security future.

STRUCTURAL SECURITY CHALLENGES

The India–Myanmar border, 1,640 km long, remains difficult to police due to rugged terrain and overlapping ethnic communities whose mobility predates the nation-state



STRATEGIC FLASHPOINT

system, making the border socially meaningless even if politically crucial. For decades, the Free Movement Regime (FMR), which allowed civilians to move up to 16 km across the border without visas—a humanitarian necessity but a security nightmare—has remained embedded in socio-cultural ethos, and informal crossings remain entrenched.

Add to this volatile mix the India–Bangladesh border, the world's fifth-longest border, riddled with cattle smuggling routes, narcotics corridors, human trafficking chains, and insurgent supply channels. Periodic incidents involving the Border Security Force (BSF) and Bangladeshi civilians



generate diplomatic tension and deepen mistrust. Rohingya mobility from coastal Bangladesh into the Northeast further complicates the matter.

With Dhaka under an interim administration, border management priorities may shift, particularly as the interim government seeks to balance domestic sentiments, maintain neutrality, and negotiate its legitimacy with various political constituencies. Together, these two borders create a dual-porosity ecosystem, representing not merely enforcement problems but embedded socio-political and economic vulnerabilities where a conflict or crisis in Myanmar does not just spill over, it cascades.

INSURGENT MOBILITY

Insurgency in Northeast India never died; it only adapted. Groups like NSCN(K), ULFA(I), PLA, KYKL and others have historically used the lawless borderlands of Myanmar as safe havens. Joint India–Myanmar operations in the 1990s and 2010s weakened them, but the current chaos allows them to regroup. Worse, some India-focused insurgent groups are reportedly to have collaborated with Myanmar's military to gain operational freedom in rebel-contested zones, a dangerous arrangement that could ignite a new cycle of violence in the Northeast. As Ethnic Armed Organisations (EAOs) increasingly control segments of the borderland, their willingness or ability to curtail such groups remains inconsistent.

Mizoram and Manipur have received successive waves of Chin and Kuki refugees, while Bangladesh continues to host nearly one million Rohingya refugees in Cox's Bazar. The protracted nature of displacement increases risks of radicalisation and criminal infiltration.

EXTERNAL STRATEGIC PENETRATION

China's economic corridor linking Yunnan to the Bay of Bengal via Myanmar weakens Indian influence and locks Myanmar deeper into the orbit of Beijing. China has deepened its ties with both the junta and selective EAOs to safeguard China–Myanmar Economic Corridor (CMEC) assets, including pipelines and port projects. This has entrenched Chinese influence over Myanmar's political trajectory.

The arc is now said to host a complex assemblage of insurgents, arms dealers, narcotics traffickers, and radical elements moving across Myanmar, India, and Bangladesh. Golden Triangle Methamphetamine production has surged, with Bangladesh's coastal belt and the Northeast region



being threatened to become transit corridors. Rohingya camps have witnessed the emergence of organised criminal syndicates with cross-border linkages. Radicalisation risks in Rohingya camps, exacerbated by reduced international aid, remain a significant security challenge for Bangladesh, India and Myanmar.

This interconnected illicit geography requires not bilateral, but trilateral coordination, something significantly complicated by the changing political posture under the interim

Where diplomacy hesitates and development stalls, insurgency, trafficking and external powers inevitably move in.

administration in Bangladesh. A three-country insurgent ecosystem is emerging, and none of the states has the bandwidth to tackle it alone. These developments underscore the need for trilateral security mechanisms, yet political mistrust limits cooperative depth.



INDIA–BANGLADESH RELATIONS

The interim government has altered the political and diplomatic texture of India–Bangladesh relations and has adopted a new foreign-policy posture by reducing automatic alignment with India, in contrast to prior governments, signalling openness to diversified partnerships with China, the United States, and regional actors. While pragmatic co-operation with India continues, the absence of stable political leadership has introduced strategic hesitation in engagement with New Delhi. This recalibration is partly driven by the desire of interim leadership for domestic legitimacy and external balancing.

Security co-operation with India, historically strong in counter-insurgency, intelligence-sharing, and border management, is facing slower decision-making, more bureaucratic caution, greater sensitivity to public opinion and reluctance to take overtly India-centric positions on Rohingya repatriation, water-sharing, and border fencing. Given India's heavy reliance on Dhaka for Northeast security, this uncertainty requires proactive engagement rather than assumption of continuity.

GEOPOLITICAL CORRIDORS

Great-power competition has added a geopolitical overlay to security dynamics. Chinese influence rests on CMEC projects, including the Kyaukpyu deep-sea port, to provide strategic reach into the Bay of Bengal and economic corridors offering Myanmar access to the Bay of Bengal. Beijing's simultaneous engagement with the Myanmar junta and EAOs enhances its positional leverage. Bangladesh also remains a major recipient of Chinese loans and defence equipment. For India, China's ability to operate simultaneously across Dhaka and Naypyidaw poses long-term strategic concerns.

As for Washington, the India–Myanmar–Bangladesh arc is not a humanitarian problem; it is a strategic wedge to undercut Chinese dominance in the Bay of Bengal. Washington is proposing and quietly pushing corridor concepts linking Eastern India, Bangladesh ports (Chittagong, Mongla), the Northeast Region, eventually Myanmar and Southeast Asian markets.

If this corridor materialises, it would force Beijing to lose its monopoly over Myanmar and the Bay of Bengal. The Northeast would be linked via Bangladesh rather than Myanmar, and India would no longer be hostage to Myanmar's instability. The USA wants Bangladesh to be integrated into Indo-Pacific supply networks and pulled away from Chinese strategic embrace.

For India, this connectivity would benefit economically but would make it lose exclusive influence over Dhaka; it would result in Bangladesh becoming indispensable and the USA gaining a foothold, forcing India to share strategic space. Bangladesh would become the pivot state of the eastern subcontinent, forcing India, China and the USA to court Dhaka.

The interim government's receptiveness to Western engagement makes Bangladesh a pivotal node in emerging connectivity frameworks. The new political context in Bangladesh, therefore, magnifies the strategic importance of corridor diplomacy. This is the new geopolitical chessboard driving the arc's future.



INTEGRATED SECURITY

Given shifting political dynamics in Dhaka and persistent instability in Myanmar, stabilising the arc requires India to consider multidimensional strategies. India must deepen engagement with the interim government through institutional, not personality-driven, security co-operation. India should conduct structured dialogues on Rohingya management and radicalisation risks with Bangladesh. India should also look for joint border-community development initiatives and depoliticised defence and intelligence frameworks, and address politically sensitive issues such as water-sharing through transparent negotiation.

The Bay of Bengal's future balance of power will be decided not at sea, but across this fragile land corridor.

Myanmar strategy, under which India should pursue tactical co-operation with whichever authority controls relevant border zones, apply pressure to limit Chinese monopoly, seek co-operation in dismantling Northeast insurgent camps, engage EAOs to prevent facilitation of Indian insurgents, and support humanitarian corridors and local stabilisation efforts.

Any emerging corridor—whether USA-linked, regional, or multilateral—must integrate anti-trafficking mechanisms, secure logistic nodes, provide economic incentives for border communities and also have intelligence co-ordination platforms. India needs to devise a strategy to use American money and alternatives to Chinese roads, but shape the corridor design to fit India's security needs.

Trying to stabilise this arc with boots and fences alone is suicidal. Realities demand a development-led security approach. The border communities are economically trapped. Under-development fuels insurgency recruitment. Lack of legal economic avenues invites smuggling networks. Ethnic mistrust deepens without an inclusive state presence.

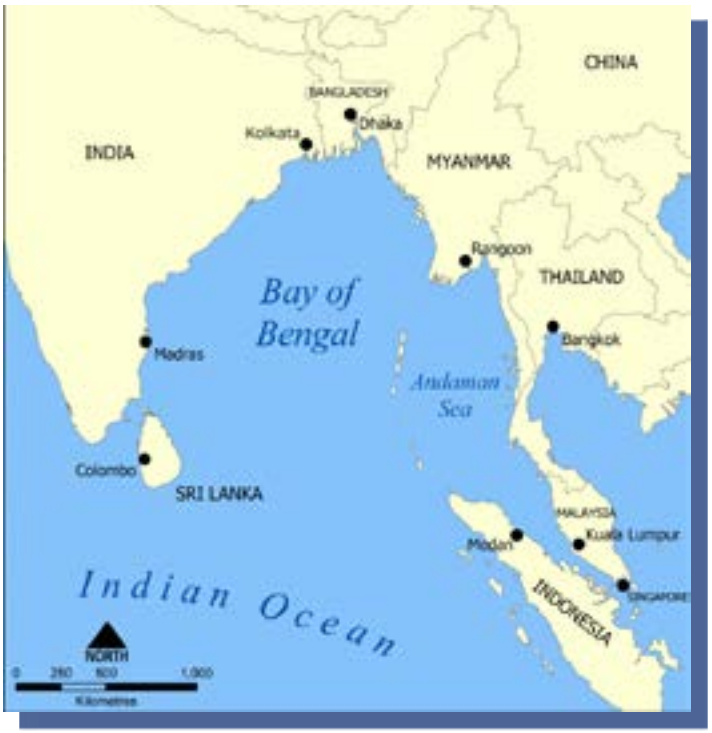
External actors would exploit economic vacuums—where India fails to build roads or markets, China builds them. Where India hesitates, the USA invests. A stable arc requires human development, border infrastructure, coordinated security, and political diplomacy working simultaneously.

A trilateral security platform comprising India, Bangladesh and Myanmar (post-conflict), joint border development zones, regulated cross-border trade, counter-trafficking systems, and refugee repatriation frameworks is strategic necessity.

ADAPTIVE SECURITY

The India–Myanmar–Bangladesh security arc stands at a moment of structural transition. Myanmar's civil war continues to destabilise the frontier, transnational insurgency networks are reviving, and external powers are vying to shape the region's connectivity landscape. The interim government in Bangladesh has introduced a new strategic variable, reshaping India's eastern calculations. While the foundations of India–Bangladesh co-operation remain intact, the foreign-policy recalibration underway in Dhaka demands renewed diplomacy and adaptive security engagement. For India, stability in the arc cannot be achieved through unilateral measures. A resilient architecture must synthesise security co-operation, political engagement, humanitarian governance, and development-led border integration, anchored in both bilateral and trilateral frameworks.

As great-power competition intensifies and domestic transitions reshape the political geography of the region, the security arc will be a decisive determinant of the Bay of Bengal's strategic future and the stability of the Northeast region. This arc will be won not by force alone, but by strategy, development, and diplomatic dominance.



*Map Not to Scale

(Ambassador Sushil Kumar Singhal, IFS (R), former Ambassador to Angola. He has served in Tanzania, Belgium, Bangladesh and Hungary. The views expressed are of the author and do not necessarily reflect the views of ***The News Analytics Herald.****)*

QUICK INSIGHTS

- ***Porous India–Myanmar and India–Bangladesh borders sustain insurgency, trafficking and cross-border criminal networks.***
- ***Myanmar's civil war has revived militant sanctuaries threatening Northeast India's fragile security environment.***
- ***Bangladesh's interim government introduces uncertainty into traditionally strong India–Bangladesh security cooperation.***
- ***China, and the USA intensify strategic competition across emerging regional connectivity corridors.***
- ***Long-term stability requires integrating security operations with development, diplomacy and border community welfare.***

GLOBAL INFLUENCER

PRESIDENT LUIZ INÁCIO LULA DA SILVA

NEWS ANALYTICS | SPECIAL COVERAGE

Few world leaders today influence the shifting architecture of global power as decisively as President Luiz Inácio Lula da Silva of Brazil. His return to office has coincided with a historic moment in international affairs: a fragmented world order, a resurgent Global South, emboldened resource nationalism, renewed climate urgency, and the emergence of multipolar blocs challenging Western dominance. President Lula's assertive leadership and diplomatic activism place him at the centre of these strategic fault lines, shaping debates that affect not just Latin America, but India, Africa, the Indo-Pacific, and beyond.



President Lula's selection as The News Analytics Herald's Global Influencer of the Month is justified not by personality alone, but by the structural role Brazil now plays under his stewardship. In 2025, he stands as the most visible champion of Global South coordination, climate justice, reform of global governance, and resource diplomacy, all of which intersect with the issues reshaping geopolitics today.

A RESURGENT GLOBAL SOUTH VOICE

President Lula's diplomatic activism—whether at BRICS+ summits, COP negotiations, G20 engagements, or regional platforms—reflects a clear ambition: restoring agency to middle and emerging powers in shaping global rules. He has become an outspoken critic of geopolitical polarisation, urging states to avoid being trapped between the strategic rivalries of the United States and China.

Under him, Brazil argues that the Global South should neither be a passive observer nor a bargaining chip in great-power competition, but an independent coalition capable of influencing supply chains, energy transitions, multilateral finance, and conflict mediation. This positioning aligns closely with India's traditional emphasis on strategic autonomy and multipolarity, making Brazil a key partner in navigating emerging global turbulence.

POWER REBALANCING

President Lula has aggressively expanded Brazil's role within BRICS+, positioning the bloc as a more assertive force in global governance. Under his leadership, Brazil is pushing for a reformed international financial architecture, reduced dependence on the US dollar, and greater voting rights for developing nations across multilateral institutions. He has also championed deeper South–South partnerships, particularly in technology and defence, to strengthen collective autonomy and strategic capacity across the Global South. As BRICS+ widens its footprint across Africa, the Middle East, and Latin America, He sees the bloc as the nucleus of a more representative world order. His leadership also reinforces the group's credibility at a moment when parallel formations—the G20, G7, and Indo-Pacific alliances—are increasingly fragmented.

OF THE MONTH

For India, President Lula's proactive BRICS role is a double-edged opportunity: it strengthens a shared commitment to multipolarity, but also demands that New Delhi safeguard its strategic manoeuvring space amidst internal BRICS divergences, especially with China's expanding influence.

CLIMATE DIPLOMACY AND RESOURCE GEOPOLITICS

President Lula has emerged as a leading global voice on climate equity and environmental sovereignty—issues with deep geopolitical implications. His pledge to protect the Amazon rainforest, combined with Brazil's leadership in biofuels, green hydrogen, and critical minerals, positions the country as a pivotal actor in the future green economy.

Brazil controls vast reserves of:

- Rare earth elements
- Nickel
- Copper
- Lithium (via partnerships in the Lithium Triangle)
- Biodiverse assets critical to biotechnology and pharmaceuticals

President Lula's stance is unequivocal: resource-rich nations of the Global South must avoid repeating historical patterns of extraction without value addition. Instead, they should leverage minerals, forests, and biodiversity as strategic assets, negotiating from a position of strength.

For India, which faces critical mineral dependencies in lithium, cobalt, and copper, Brazil represents not only a partner but a potential stabiliser in securing diversified supply chains. As India pursues green manufacturing ambitions—especially EVs, solar modules, and grid storage—his administration's willingness to build industrial partnerships is a significant geopolitical opportunity.

NON-ALIGNMENT 2.0

Unlike many major powers, President Lula positions Brazil as a neutral mediator capable of engaging Russia, the West, the Middle East, and African states simultaneously. His bold, if controversial, peace proposals for the Ukraine conflict reflect a belief that the Global South must not be bystanders in great-power crises.

This agenda intersects with India's diplomatic posture—balancing interests in Eurasia, defending sovereignty norms, and advocating negotiated outcomes over coercion. His efforts reinforce a shared non-aligned ethos updated for the 21st century: strategic pluralism over strategic alignment.

President Lula's international assertiveness draws strength from Brazil's solid domestic foundations. The country's diversified economy, major agricultural output, and high degree of energy self-sufficiency provide strategic resilience uncommon among emerging powers. Brazil's world-leading biofuel ecosystem and the largest military-industrial complex in Latin America further enhance its autonomy and global influence. Together, these capabilities give President Lula both the economic weight and political legitimacy to shape international debates, making Brazil an indispensable actor in climate negotiations, global trade discussions, and evolving security frameworks.

SURVEILLANCE WITHOUT SOVEREIGNTY: HOW COUNTER-TERRORISM BECAME TOTAL CONTROL

BATTLEGROUND

As artificial intelligence reshapes global counter-terrorism, the line between security and surveillance is rapidly dissolving. What began as a tool to prevent violence is evolving into a system of total monitoring, predictive control and digital coercion. The case of Burkina Faso exposes how sovereignty, privacy and even basic human rights are now being quietly renegotiated through technology.



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Although it was October 2025 when UN Special Rapporteur Ben Saul released the embargoed Draft Report in the United Nations, NY, outlining policy needed to protect human rights when using AI for "counter-terrorism", the horse had well and truly bolted years earlier. In fact, it is believed that in the 1980s, the US government could locate "dissidents" immediately. No concern for fear, the programme was only used in times of political upheaval, which just happened to be loosely defined to include such things as widespread non-violent mass protests against the US military in Latin America (e.g. Nicaragua). In short, programmes run essentially to involve data collection for the purpose of creating "profiles" of individuals used to determine their risk to society. Sadly, it appears they also targeted low-income minority areas in LA and New Orleans, reinforcing old policing sterotypes. Although this was not the ultimate goal..

When surveillance moves from state oversight to private profit, transparency collapses and accountability becomes optional.



POST-9/11 PARADIGM

By post 9/11 (i.e. Sept 11, 2001), "fighting terrorism by terrifying US citizens and making everyone a subject" was the known paradigm. Fear is always a "top seller" when it comes to controlling human behaviour and born of the fear-driven mindset embraced widely by the US National



Security neoconservative geniuses.Users were flagged for neuropsychiatric violence with the "idea" that people could either end up under a court-appointed physician or even be put under house arrest without due process. One can only marvel at the insight! It reminds me of Elon Musk's recent idea that perhaps criminals could have a free Optimus with them 24/7 to prevent them from committing crimes!!!??? Although given Sam Altman's ChatGPT, which is currently being sued after somehow being related to four deaths, the hope is that Optimus does not communicate with ChatGPT so that criminals don't commit suicide after 24/7 days with Optimus!!!??

PRIVATISED SURVEILLANCE

Despite the enormous opportunity 9/11 presented to take wider control over society, the programme was allegedly losing its support in the US Congress due to Constitutional Right to Privacy concerns and was about to be defunded. Aside from privacy, it is simply not rational thinking to treat everyone in society as a suspect, i.e. an enemy.

Then again, the defunding could also have been prompted by the neocons' involvement in numerous scandals such as the illegal Iran-Contra arms-for-prisoner deal, their endless beyond-jurisdiction push for war and/or regime change and/or investigations into lead neocons' questionable profit-driven actions that caused their ideas, thinking, outcomes generated, credibility and ethics to lose "official" favour. Who knows?

Irrespective of how they appear to have successfully bypassed privacy concerns, Congressional oversight and the funding issue was to magically shift this government programme into the private sector, quelling public opposition. A group of execs, who were former tech insiders connected to a digital payments firm offered a vehicle to facilitate the transfer of a government surveillance program into private hands. The move effectively shifted oversight away from Congress, placing profit-driven actors at the centre of national security data operations. The resulting platform worked closely with the national security establishment, initially serving a single intelligence client. The stated objective was comprehensive data aggregation—to enable counterterrorism, crime prevention, and predictive policing—raising profound concerns about mass surveillance and democratic accountability

ALGORITHMIC POLICING

They exploit all your personal information, including health and financial information, purchasing decisions, connections with family, friends, organisations, photos, and biometrics for pre-crime, to label people as "subversive" depending on whether the predictive policing pre-crime "algorithm" thinks you might do something wrong in the future. Today, AI can be deployed in a range of activities associated with counter-terrorism. This includes such things as threat detection, risk assessment, digital and physical surveillance, border management, predictive policing and force deployment, detention and military decision-making. It can also be used to enhance and augment other technologies and capabilities used in law enforcement, from planning, simulations and resource allocation to modelling operations logistics.

AI systems operate with different degrees of autonomy, which impact the level of human input and control there is over specific situations. Make no mistake, I am by no means against programmes that use the latest technology to do anything; I just understand what human rights entail, and how to protect them. Accordingly, defining terrorism and counter-terrorism and understanding the causal issues is perceived as critical. When defining both terrorism and counter-terrorism, it is critical not only to include all sectors of society in that definition but specifically ensure that UN Member States (and any agents representing the State) are able to be held accountable under the definitions rather than excluded and/or provided an impunity loophole. My position is due primarily to the inconvenient truth that it is often governments that perform both terrorist and counter-terrorism actions.

When even states surrender data sovereignty, individual human rights become structurally negotiable rather than inviolable.

CASE STUDY: BURKINA FASO

Burkina Faso was offered the opportunity to participate in a UN Digital ID programme but declined. The rationale for declining was outlined as follows:

Every citizen is enrolled – fingerprints scanned – facial recognition captured – iris patterns recorded – voice samples recorded – and the intent to include health and financial information and use it and other personal data (eg education, friends and family, etc) to create an algorithm-determined "threat" each Being poses.

This sensitive data is stored in the cloud – on distributed

servers – in multiple jurisdictions – primarily North America, Europe, Asia – under the various jurisdiction(s) laws, ie it would not even operate under the laws of the citizens' own state, e.g. Burkina Faso.

While the individual citizen owns the data, it is held in trust by administering organisations for the citizens' benefit and protection. It was sold/marketed as a "partnership" model, but understandably was perceived as a "custody with better marketing" model.

Burkina Faso (nor any participating state/organisation that isn't part of the Administering Trust) cannot:

- Audit the systems
- Regulate the systems
- Enforce their own laws on servers they don't control

Concerns were raised about the 73-page UN Digital ID contract related to P47 clauses buried, P62 terms hidden in legal language and Section 7.3.2 liability waivers. The contract is required to assess if these issues may impact human rights.

If states can be financially and militarily punished for resisting digital control, what protection does the ordinary citizen truly have?

The sovereign decision taken by Burkina Faso to create its own data servers and encryption-controlled digital system was aimed at retaining national oversight and citizen privacy. However, under the UN Digital ID framework, even state sovereignty in counter-terrorism appears constrained, with little accommodation of Burkina Faso's concerns. After refusing participation, IMF and World Bank loan support was reportedly withdrawn, followed by foreign military interventions.

This sequence has intensified fears of coercion and systemic overreach. The precedent suggests that non-compliance is met with severe consequences, fuelling concerns of "state-sponsored coercion." If states face such pressure, individuals—whose finances can be frozen without due process, as seen during Canada's trucker protests—are even more vulnerable. This highlights the urgent need for accountability, legal safeguards, and protection of fundamental human rights.

CAUSAL ISSUES

In addition to the above, it is perceived as critical to address the causal issue(s), i.e. why do terrorism and subsequently counter-terrorism exist? I perceive the causal issues relate directly to unmet human rights and needs, and the UN Draft policy document targets the effects, not the cause. Note, our human needs are a self-evident truth and defined below:

- Clean air and water
- Food
- Shelter (clothing and housing)
- Education (formal and non-formal, ie experiential learning)
- Healthcare (of choice and all types, eg alternative, traditional, etc.)
- Self-actualisation (follow our truth and passion to use our unique skills and talents for the benefit of the whole)
- A safe and secure environment in which to have all our needs met (ie the true role of government is perceived as to provide the framework to support the growth and development/self-actualisation of every Being, ensuring all their needs will be met)

We all contribute to humanity/the reality on Earth – it is our birthright for all – not some – to have our human needs met. Our needs are our human rights. They are reflected in the Universal Declaration of Human Rights and the two supporting documents, i.e. the International Covenant on Civil and Political Rights (ICCPR) and the International Covenant on Economic, Social and Cultural Rights (ICESCR). The needs of every Being can be achieved within the current economic structure/financial architecture on the planet, as it was designed around the concept of scarcity. Accordingly, it produces a climate of fear and greed and unmet human rights and needs. Irrespective, it is up to governments and/or those tasked with creating the programmes that use AI to ensure human rights and needs are met.

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QUICK INSIGHTS

- ***Surveillance for counter-terrorism began long before AI, rooted in state power, political control, and repression.***
- ***Post-9/11 fear legitimised mass surveillance, suspicion, enforced compliance, and entrenched emergency governance.***
- ***Privatised intelligence moved surveillance from public accountability to unchecked corporate dominance.***
- ***Burkina Faso rejected UN Digital ID to defend data sovereignty, national security, and constitutional self-determination.***
- ***Financial punishment now replaces war as the preferred tool of pressure, compliance, coercion, and control.***

AMERICA'S HIGH-STAKES MILITARY RESET IN ASIA

GEOSTRATEGIC

For decades, American military power in the Pacific was built on concentration—large bases, massive fleets, and dominant airfields. That era is ending. Driven by China's expanding missile reach, the United States is now dismantling its traditional posture in favour of dispersed, mobile, and networked forces across the Indo-Pacific. This strategic shift is quietly reshaping deterrence, alliance dynamics, and regional stability.



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For decades, the United States military relied on big bases, big ships, big fleets, and big airfields. Size meant power and concentration meant strength. But in the Asia-Pacific today, that thinking has changed dramatically. The US is now deliberately breaking its military presence into many smaller, hidden, fast-moving elements spread across the region. Troops, ships, aircraft, missile teams, logistics hubs, and command posts are dispersing across islands, coastlines, mountain areas, and remote airfields.

This new approach goes by several names — "Distributed Lethality," "Agile Combat Employment," "Multi-Domain Operations," and "Expeditionary Advanced Base Operations." But the core message is simple: don't gather everything in one place. Spread out, stay mobile, stay connected, and be able to act from anywhere. It is a profound change in how the US operates in Asia, and one that carries deep strategic consequences for the region.

Large bases once symbolised power; today, they symbolise vulnerability in a missile-saturated battlefield.



POWER DISPERSED

To understand why the US military is scattering its forces, it is necessary to examine what has changed in the Pacific—China's missile power. Over two decades, China has created a massive arsenal of long-range, high-accuracy missiles capable of striking US air bases, aircraft carriers, supply depots, command centres, ports, fuel hubs, and radar installations. Even the smallest US bases in Japan, Guam, and the Philippines can now be targeted within minutes. Historically, large bases supported thousands of personnel and massive equipment. Today, a few missile strikes could disable even the most important installations.

MISSILE REALITY

Large targets, once symbols of power, have become liabilities. A massive air base with 80 jets parked together is easier to strike than ten small airfields with eight jets each. A giant warship carrying enormous firepower is easier to track than numerous smaller ships carrying fewer, yet still lethal, weapons. This reality led the US to ask a fundamental question: what if its forces were scattered so widely that an adversary could neither track them all nor predict their movements? This question lies at the heart of the new strategy.



The future of warfare in the Pacific belongs not to concentration, but to dispersion, deception and rapid mobility.

Distributed operations are not complex in concept. They emphasise flexibility, connectivity, and concealment. Instead of one large base, the US now uses many small ones. Instead of large formations, it deploys independent teams. Instead of a single command centre, authority is decentralised. Rather than staying in predictable locations, forces constantly shift positions. Smaller ships are now armed with powerful missiles instead of relying solely on large warships. It is like storing valuables in dozens of small safes instead of one giant vault. Even if one site is hit, the rest survive. The US military believes this dispersion will ensure survivability, operational continuity, and unpredictability during the opening phases of any conflict.

NAVAL REINVENTION

The US Navy's shift is especially visible. Traditionally centred around aircraft carrier strike groups, the Navy is now reorganising into multiple smaller, independently operating strike formations armed with long-range missiles. This concept, known as Distributed Lethality, ensures that firepower is spread across many platforms instead of concentrated on a few.

Modern missiles such as the Tomahawk, SM-6, and LRASM allow even smaller ships to exert devastating force. Destroyers, Littoral Combat Ships, future frigates, and unmanned surface vessels are all being upgraded with enhanced strike capabilities.

In the Pacific today, US naval forces regularly break into smaller units, manoeuvre unpredictably, test long-range strike tactics, and operate closely with Japan and Australia. This transformation is already underway, not merely theoretical.

AIR–LAND SHIFT

The US Air Force has adopted its own version of dispersion through Agile Combat Employment (ACE). Under this system, aircraft operate from multiple small airfields, move constantly, and are supported by compact teams using improvised infrastructure such as roads and temporary runways. Aircraft are deliberately kept dispersed to avoid being destroyed on the ground.

Across the Pacific, the Air Force now rotates fighters and bombers through remote Japanese islands, Philippine EDCA sites, northern Australia, Micronesia, Palau, Guam, and Tinian. Aircraft are never meant to remain in one location long enough to become easy targets. ACE is now one of the most advanced distributed systems in the entire US military.

The US Army fits into this structure through Multi-Domain Operations. Small missile units armed with Tomahawk cruise missiles, SM-6 long-range missiles, Precision Strike Missiles, and hypersonic weapons are now being deployed across the Pacific. These units are designed for rapid set-up, firing, and relocation. The US is positioning or negotiating deployments in Japan, the Philippines, Australia, Palau, Guam, and Micronesia. For the first time, the US can project long-range firepower deep into the region directly from land, rather than relying exclusively on air or sea platforms.



The Marine Corps has gone even further with Expeditionary Advanced Base Operations. Marines now train to operate in tiny mobile teams deployed on beaches, small islands, and concealed jungle locations. These units establish temporary missile launch sites, fire, and relocate within hours, often remaining invisible to radar and satellites. They rely on systems such as NMESIS, a mobile anti-ship missile launcher. Training is active across Japan, the Philippines, Australia, Guam, and Palau, where the Marines are constructing a network of temporary firing positions throughout the region.

While individual bases shrink, the overall military footprint expands—quietly deepening great-power rivalry across the Pacific.



PACIFIC RESET

The Asia-Pacific has become the centre of this shift for three reasons. First is geography: the Pacific's vast archipelagos, coastlines, and remote territories provide ideal conditions for dispersion. Second is China's missile power—no other region faces an adversary capable of striking so many targets so quickly. Third is allied support. Japan, Australia, and the Philippines are all willing to host small US units, permit rotational deployments, develop shared facilities, and train jointly. This combination makes the Pacific uniquely suited for distributed operations.

This strategy is no longer experimental. Distributed Lethality is fully operational within the Navy. ACE is actively practised by the Air Force through continuous exercises. Multi-Domain Task Forces are active within the Army. The Marine Corps is already executing island-based manoeuvre operations. Joint exercises among the US, Japan, Australia, and the Philippines now regularly use these new distributed methods. In practical terms, the shift is already reshaping daily military activity across the region.

The implications are profound. A scattered US presence is resilient and unpredictable, offering no obvious targets or clear "first-strike" opportunities. Allies such as Japan, the Philippines, Australia, and Pacific island states take on larger roles, increasing both cooperation and strategic responsibility. China faces growing challenges, as tracking dozens or hundreds of dispersed units is vastly more complex than monitoring a few large bases. However, increased activity also raises the risk of accidental encounters, miscalculation, and unintended escalation. Paradoxically, while individual bases are becoming smaller, the overall military footprint is steadily expanding through additional logistics routes, surveillance networks, and pre-positioned equipment.

The Pacific is now entering a new strategic era. The US military's transformation here is faster and deeper than anywhere else in the world. Its posture now prioritises survivability, mobility, flexibility, unpredictability, and resilience. Large targets are becoming obsolete while small, mobile forces now dominate operational thinking. Whether this shift ultimately produces greater stability or heightened tension remains uncertain. What is clear, however, is that the United States is rebuilding its entire military posture in Asia, not around size, but around agility and dispersion. This is the new normal for the region.



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QUICK INSIGHTS

- ***China's missile power has made large US bases increasingly vulnerable across the Pacific.***
- ***The US is shifting towards dispersed, mobile, and networked military operations.***
- ***The Navy, Air Force, Army and Marine Corps are all adopting distributed warfare concepts.***
- ***Allies like Japan, Australia and the Philippines play expanding operational roles.***
- ***Dispersion boosts survivability but increases escalation risks and regional militarisation.***

CURTAIN RAISER

SINGAPORE AIRSHOW 2026: WHERE ASIA'S AEROSPACE FUTURE TAKES SHAPE

NEWS ANALYTICS | SPECIAL COVERAGE

As the global aerospace and defence community looks towards early 2026, attention is firmly fixed on Singapore, which will host Asia's most influential aerospace and defence exhibition — the Singapore Airshow — from 3–6 February 2026 at the Changi Exhibition Centre.

Held biennially, the Singapore Airshow has evolved into a critical platform where industry leaders, governments, militaries, and innovators converge to shape the future of aviation, defence, and space. The 2026 edition assumes heightened relevance amid geopolitical volatility, rapid technological disruption, and accelerated defence modernisation across the Indo-Pacific and beyond.

PREMIER AEROSPACE & DEFENCE MARKETPLACE

Since its launch in 2008, the Singapore Airshow has steadily consolidated its position as Asia's leading aerospace exhibition, rivaling established Western airshows in scale, influence, and commercial significance. Its true strength lies not merely in aircraft displays, but in its ability to attract decision-makers — defence chiefs, procurement officials, aerospace CEOs, policymakers, and investors — into a focused, trade-centric environment.



Singapore's strategic location, political neutrality, and world-class infrastructure have made the Airshow a preferred venue for East–West engagement, particularly at a time when defence supply chains, technology partnerships, and market access are being reconfigured globally.

Event Snapshot

- *Event: Singapore Airshow 2026 (Trade Days)*
- *Dates: 3–6 February 2026*
- *Venue: Changi Exhibition Centre, Singapore*
- *Focus Areas: Civil aviation, defence and military aerospace, unmanned systems, advanced air mobility, space and emerging technologies*

The trade-focused format ensures high-quality engagement, allowing exhibitors and visitors to move beyond displays to substantive business, policy, and strategic discussions.

CONFLUENCE OF POWER & TECHNOLOGY

The 2026 edition is expected to host over 1,000 companies from more than 50 countries, spanning aircraft manufacturers, defence primes, subsystem suppliers, avionics firms, MRO providers, space-tech start-ups, and advanced manufacturing players.

For defence and security stakeholders, the Airshow remains a vital venue to assess next-generation combat aircraft, ISR platforms, unmanned systems, electronic warfare solutions, and aerospace enablers. In parallel, civil aviation participants will focus on fleet modernisation, sustainability pathways, digital aviation, and passenger experience technologies.

High-level government and military delegations from Asia, Europe, the Middle East, Africa, and the Americas are expected, reinforcing the Airshow's role as a strategic and diplomatic marketplace, not merely a commercial exhibition.

A defining feature of the 2026 cycle is the introduction of a dedicated Space Summit, reflecting the growing convergence of aerospace, defence, and space domains. As space becomes central to national security, communications, navigation, and economic competitiveness, Singapore is positioning itself as a regional hub for space dialogue and cooperation.

This expansion acknowledges a fundamental shift: future aerospace power will increasingly be shaped beyond Earth's atmosphere.

Strategic Relevance For India

- *Gateway to Indo-Pacific markets: Positions Indian aerospace and defence firms for Southeast Asian and wider Asia-Pacific partnerships.*
- *Showcase for Make in India: Enables global visibility for India's indigenous military aviation, MRO, UAV, and aerospace technologies.*
- *Reading regional airpower trends: Offers insight into evolving Indo-Pacific air combat, ISR, unmanned, and air-defence capabilities.*
- *Platform for defence diplomacy: Strengthens Act East engagements through military dialogue and industry partnerships with key regional and global players.*
- *Alignment with space ambitions: Supports India's growing role in satellite launches, space security, and commercial space collaboration.*

WHY IT MATTERS

Beyond exhibition halls and static displays, the Singapore Airshow is valued for its high-level forums and strategic dialogues, addressing global market outlooks, defence procurement trends, supply-chain resilience, sustainability, autonomous and AI-enabled aviation, and workforce transformation.

Sustainability will be a major theme, with emphasis on sustainable aviation fuels (SAFs), efficient propulsion systems, lighter materials, and lifecycle optimisation. Innovation zones and start-up showcases are expected to spotlight advances in AI, robotics, digital twins, additive manufacturing, and smart MRO solutions, reinforcing the Airshow's role as a barometer of technological direction.

Arriving at a time of intensifying great-power competition, defence modernisation, and aviation recovery, Singapore Airshow 2026 is strategically timed. For Asia-Pacific nations, it offers a platform to assert strategic autonomy and deepen defence-industrial cooperation. For global players, it provides access to one of the world's fastest-growing aerospace and defence markets.

Bridging commerce, security, and diplomacy, the Singapore Airshow is far more than an aircraft showcase — it is a reflection of shifting global power and technological trajectories.

As February 2026 approaches, the Airshow is set once again to shape conversations on where the skies — and space — are headed next.

HYDROPOLITICS AND THE GLOBAL BATTLE FOR WATER

DIPLOMACY

Water has shaped civilisations, ignited wars and redefined geopolitics across millennia. Today, as populations surge and climate pressures intensify, transboundary rivers remain flashpoints of tension from the Middle East to South Asia. India's own water disputes—with Pakistan, China, Bangladesh and Nepal—underscore a harsh reality: managing shared rivers now demands political maturity, scientific cooperation and resilient diplomacy to prevent future conflict.



AMBASSADOR JEITENDRA TRIPATHI, IFS (R)
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Water has been an important requirement for humankind since time immemorial, not only for human and animal consumption but also for agriculture, the sustainability of life—zoological and botanical alike—and, of late, for the generation of power from steam to hydel. Rivers have been the main source of potable water since the history of life on Earth. Currently, nearly 40% of the global human population is sustained by 276 rivers, which produce around 60% of fresh water. Obviously, fresh water's importance has been a source of wealth, envy and tension, causing conflicts between societies and kingdoms.

Such tensions or conflicts are not unusual in history. In 2500–2400 B.C., Mesopotamian city-states frequently clashed over fertile soil, irrigation systems and water diversions. The states of Umma and Lagash clashed over the distribution rights of the waters of the Euphrates and Tigris rivers. In 700 B.C., in Assyria, King Sargon II destroyed the irrigation network of the Armenian Haldians. In 612 B.C., Babylonia caused flooding by diverting the course of the Khors River. In 680 C.E., Umayyad forces led by Yazid effectively blocked the enemy's access to the Euphrates River, defeating Hussain ibn Ali (the grandson of the Prophet

Water is no longer a neutral shared resource; it has transformed into a strategic asset that nations increasingly use to secure influence, leverage and geopolitical advantage.



Muhammad) and his followers. In 1503 C.E., river diversions were planned by Italian city-states to stop river water from reaching their adversaries. It is stated that during the past 4,500 years, there have been more than 1,600 cases of violence related to water between states. The worst-affected region is the Middle East, where just 1% of the world's fresh water has to cater for 5% of the world's population.



MODERN FLASHPOINTS EMERGE

In modern times, most water-related tensions have been witnessed in the Middle East and Asia. The Nile River basin conflict between Egypt, Sudan and Ethiopia remains unsettled. The Grand Ethiopian Dam, constructed by Ethiopia in 2020 to store 74 billion cubic metres of water for producing 5,150 MW of electricity, has been objected to by Egypt and Sudan. The Jordan River basin has also been a cause of discontent and conflict between Jordan, Israel and Lebanon. With the tripling of the population in the region since 1950, the water of the Jordan River has become scarcer. Similarly, the Euphrates–Tigris basin still remains under dispute between Iraq and its neighbours.

In Asia, India has disputes with many of its neighbours regarding the sharing of transnational rivers. Although India has settled the land boundary with Bangladesh, the agreement on sharing the Teesta River's water could not be reached due to stiff objections by the Government of West Bengal, perhaps along party lines. Similarly, the construction of a dam on the Kosi River by India for power generation has caused discontent in Nepal, though India has agreed to share the power thus generated. However, the major issue has been the Indus Waters Treaty signed between India and Pakistan in 1960 for sharing the Indus water system. According to the Treaty of the Indus and its five tributaries, India had absolute authority over the water flow of the Sutlej, Beas and Ravi, while the waters of the Chenab, Jhelum and Indus were awarded to Pakistan. Thus, the Treaty awarded a total of 59 million acre-feet to India, while Pakistan was given 64 million acre-feet—more than India.

India was given the right of non-consumptive use of the three western rivers—Chenab, Jhelum and Indus—which means India could not store the waters of these rivers for irrigation and potable use but could use them to construct hydroelectric power plants of the "run-of-the-river" type, where the volume of water emanating from the power plant remains unaltered. This distribution was clearly biased in favour of Pakistan, as it adversely affected the requirements of power generation and irrigation in Jammu & Kashmir. But, showing generosity towards Pakistan's claim that the Indus River system was the lifeline of its Punjab province, India agreed to the Treaty. There was also a provision for financing the construction of dams on the Pakistan side by several countries, including India, and we honoured this obligation despite tense relations.

WORLD BANK

Unfortunately, 7.5 million acre-feet of water allotted to India was also allowed to flow to Pakistan, as India was unable to utilise it. Peculiarly, the Treaty brokered by the World Bank has neither an exit clause nor any provision for amendment, although it can be suspended or put on hold—though this too has not been explicitly provided for (India has put the Treaty in abeyance after the Pahalgam terror attack by Pakistan-based terrorist organisations).

The dispute resolution mechanism provides for a Permanent Indus Commission, a Neutral Expert and a Court of Arbitration,



in that chronological order. India has, under the Treaty, constructed a few dams on its side despite objections from Pakistan. Other proposed dams are yet to materialise. India's decision not to release the 7.5 million acre-feet of water and to utilise it instead for irrigation and power generation has not gone down well with Pakistan, which, trying to play the victim

The Indus Waters Treaty continues to stand as one of the world's most politically delicate and vulnerability-prone water-sharing agreements, constantly exposed to shifting bilateral tensions.

card, accuses India of waging a "water war". Pakistan has also resorted to illegal "river training" by diverting the flow of part of the Indus River towards Gujarat, thereby polluting salt fields.



ADDITIONAL PRECAUTIONS

Another dispute on transnational water exists between India and China. China is constructing a huge dam (more than thrice the size of the Three Gorges Dam), which, besides being a seismic threat, poses a potential danger to our North-Eastern region. If, in times of tension, China releases water, it will cause flooding in the region. To minimise this, India plans to construct two dams in the region, and we have reached an understanding with China for sharing relevant data regarding the dam and its storage. Yet, given China's past actions, additional precautions are necessary.

Absent sustained diplomatic cooperation, shared rivers can rapidly transform from essential lifelines into powerful sources of friction that may ignite serious regional or international conflict.

With Bangladesh, India has a minor dispute regarding the sharing of the Teesta River water. The river originates in Sikkim, passes through Bangladesh before entering West Bengal, and has a catchment area of 1.7 million sq. km in northern Bangladesh, serving as a lifeline for rice cultivation. Bangladesh has long objected to India's usage in the upper riparian area. In 1983, a temporary understanding was reached under which India was to receive 39%, Bangladesh 36% and the remainder remained unallocated. However, this did not satisfy Bangladesh, and the issue remained unresolved. In 2016, we were close to reaching an agreement with the Sheikh Hasina government, but it fell through due to objections from the West Bengal government.

A fourth and very minor tension point exists with Nepal over the Kosi River. The Kosi, with six tributaries, flows from the Tibetan plateau across Nepal to meet the Ganga in Bihar. It is known for frequent changes in its course, causing floods and devastation in both Nepal and India. A treaty was signed in 1954 and revised in 1966, but discontent in Nepal has persisted. Nepal has occasionally accused India of encroaching upon its territory by taking advantage of the river's shifting course. However, this has not escalated into serious tension.

CAUSES AND CURES

In Southeast Asia, the centuries-old dispute among Myanmar, Thailand, Cambodia, Laos, China and Vietnam was resolved by establishing the Mekong River Commission some thirty years ago. There have also been disputes in African nations over the sharing of transboundary rivers, but they have not escalated significantly.

There are eight factors causing tension or conflict over transboundary rivers affecting water sharing: scarce and unevenly distributed water resources; lack of binding international agreements (sometimes lopsided); population pressure; climate change reducing potable water; growing reliance on hydroelectric power; the need for food security; excessive water usage; and the weaponisation of water by countries with abundant resources.

The cure lies in negotiated agreements between parties, addressing concerns with empathy and consideration. For example, India could have resolved the Teesta issue had it not been opposed by the West Bengal government, which observers attributed to playing petty politics over national interest. Successful examples include the sharing of the Mekong River through the Mekong River Commission and the sharing of the Iguazu River water and dam-generated power by Argentina and Brazil. These examples demonstrate that, with a willingness to accommodate legitimate concerns, sustainable solutions are achievable. Without such flexibility, the prophecy that "the next world war will be fought over water" may soon become a reality.

(Ambassador Jeitendra Tripathi, IFS (R.), Former Ambassador to Zimbabwe. He has vast experience in Africa, Europe, the Middle East, and Latin America. He was also India's Ambassador to Zimbabwe. The views expressed are of the author and do not necessarily reflect the views of ***The News Analytics Herald.****)*

QUICK INSIGHTS

- *Water conflicts have existed throughout history, shaped by scarcity, geography, political interests and strategic competition.*
- *Major transboundary river tensions continue today across the Middle East, Africa and Asia's most critical basins.*
- *India navigates challenging water disputes involving Pakistan, China, Bangladesh and Nepal across multiple shared rivers.*
- *Climate stress and rising populations sharply increase pressure on already limited and uneven freshwater resources.*
- *Sustainable peace demands negotiated, science-driven, mutually considerate water-sharing frameworks among all riparian nations.*

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HOW CLIMATE STRESS IS RESHAPING FUTURE DEFENCE PLANNING

WAR STRATEGY

Climate change is no longer only an environmental or economic problem; it is one of the defining geopolitical concerns of this century. As weather patterns shift, global temperatures climb and sea levels rise, climate-driven phenomena are liable to amplify existing geopolitical tensions and create new security challenges. For defence planners, this implies preparing not just for more frequent humanitarian missions, but for a fundamentally different operating environment where extreme weather, population displacement and stressed infrastructure combine to increase the likelihood and intensity of conflict within societies as well between nations, complicating alliances and requiring de-novo revision of capabilities and doctrines.



LT GEN KAPIL AGGARWAL (R)
FOR **NEWS ANALYTICS**

The term "risk multiplier" implies that climate change rarely creates new conflicts on its own; rather, it magnifies and accelerates underlying tensions of economic inequality, territorial disputes, resource scarcity, and weak governance. Droughts and heatwaves weaken agricultural production and livelihoods, increasing competition over food and water. Sea-level rise and storm surges threaten coastal cities and military bases, degrading infrastructure and forcing costly relocations. Extreme weather can simultaneously damage energy networks and transport corridors, compounding logistical vulnerability. In fragile states, these stressors can erode governance and provide openings for violent non-state actors. Simultaneity of multiple climate events, such as drought (triggering agricultural decline) followed by mass migration, can intensify geopolitical shocks. In short, climate change has the potential to magnify friction across the spectrum of national security concerns.

Climate change can become particularly consequential for geopolitics in the following scenarios:

- Systemic Simultaneity: Climate shocks can often be large-scale and synchronous—heatwaves across multiple breadbaskets, frequent tropical cyclones in a season, or widespread glacier melt. When several regions experience such events, the capacity of the international community



to respond (humanitarian aid, food supply, disaster relief) is stretched thin, increasing the chance that crises will escalate into political conflict.

- Slow / Sudden Onset: Some effects (sea-level rise, desertification) unfold across decades while others



(hurricanes, flash floods) are immediate. Defence planning must accommodate both the gradual reconfiguration of strategic landscapes and rapid humanitarian contingencies.

- Cross-Domain Cascading Effects: Climate impacts in one domain (e.g., agriculture) cascade into others (migration, economies, political stability), producing complex, hard-to-predict outcomes that challenge conventional risk models.

South Asia, the Arctic and the Middle East are emerging as climate-triggered theatres of geopolitical competition.

CLIMATE HOTSPOTS

There are many regions where climate instability can manifest into political and economic vulnerabilities and create conditions for conflict.

- South Asia: With nearly two billion people and dependence on Himalayan glacial melt, water scarcity threatens to aggravate rivalry between India, Pakistan, and Bangladesh. Rapid sea-level rise may trigger large-scale migration from Bangladesh, potentially destabilising the region.

- The Middle East: This highly urbanised region with water scarcity is projected to experience extreme heat events incompatible with outdoor human survival. Competition over the Tigris–Euphrates and Nile basins could heighten tensions among regional powers.

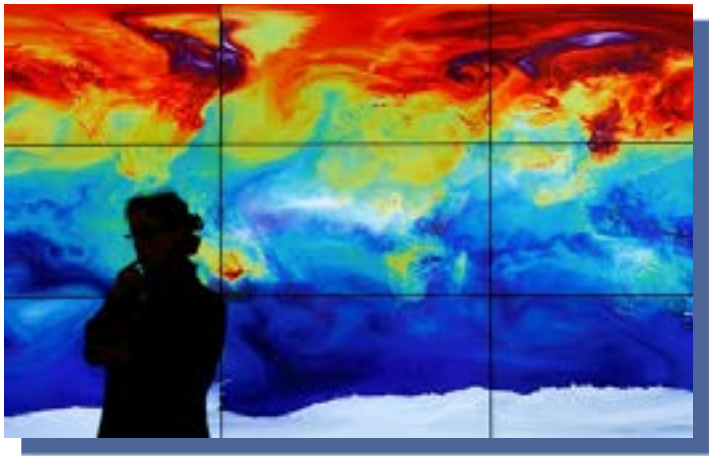
- The Arctic: Melting ice is opening new sea lanes and exposing untapped resources. As global powers compete for access and influence—particularly Russia, the United States, and China—the Arctic could become a theatre of strategic contestation.

- Sub-Saharan Africa: Fragile states face the dual challenge of desertification and rapid population growth. Climate-linked food insecurity could strengthen extremist groups and ignite resource-based conflicts.

GEOPOLITICAL CONSEQUENCES

Reduced freshwater availability and productive land can intensify competition between states and within borders. Transboundary river basins become potential flashpoints if upstream water scarcity prompts damming or diversion. Polar regions, particularly the Arctic, are open to navigation and resource exploitation as ice retreats, accelerating competition among polar and non-polar powers over territorial claims, shipping rights, and mineral resources. Diplomacy must therefore evolve to manage resource sharing and access rights.

Migration and Urban Stress: Large-scale displacement, whether internal or cross-border, creates humanitarian obligations and domestic political pressures. Sudden influxes can exacerbate ethnic tensions, strain public services, and become a catalyst for populist backlash. Robust, humane governance that integrates development and orderly relocation mechanisms can mitigate such destabilising effects.



Security Co-operation and Alliance Dynamics: Climate change creates both incentives and friction for co-operation. Shared risks, such as disaster response in small nation-states, incentivise joint exercises and multilateral agreements. Conversely, competition for diminishing resources can strain alliances. Defence planning must prioritise interoperability with partners and consider climate resilience as a metric for alliance-building.

Rising seas, failing crops and mass displacement will increasingly shape military doctrines more than traditional threats.

CLIMATE STRESS & WARFARE

Force Readiness and Training: Rising temperatures and frequent extreme weather events affect personnel health, equipment performance, and training cycles. Heat stress



reduces troop endurance and increases heat-related casualties. Extreme weather can also lead to cancellation or relocation of exercises, compromising readiness. Defence forces will need revised training regimens adapted to climate conditions and upgraded medical capabilities in hotter environments.

Infrastructure and Basing: Many military installations—ports, airfields, fuel depots—were sited in an era that did not account for higher sea levels and extreme climate events. Bases in low-lying regions face chronic flooding and storm damage. Adapting critical infrastructure requires hardening (flood defences, elevated runways), strategic relocation and investment in modular, rapidly deployable alternatives.

Intelligence Planning: Effective threat assessment requires integrated climate, economic, political and social analytics. Intelligence services must incorporate climate risk indicators such as crop yields, water levels and population movement into early warning models. Planning cycles should include climate scenario wargaming that simulates multi-domain and multi-year disruptions.

Logistics and Supply Chains: Modern militaries depend on long, global supply chains. Climate shocks can disrupt sea lanes, damage transport networks, and affect fuel and spare parts availability. Defence planners must build redundancy, preposition supplies in resilient locations, and strengthen local sourcing during regional climate disasters.

Humanitarian Assistance and Disaster Relief: Climate events may increase military involvement in disaster relief. These missions divert resources from other operations. Defence organisations should develop modular units optimised for such assistance.

INDIA-SPECIFIC CHALLENGES

India confronts acute climate risks across its diverse geography, from Himalayan glaciers to coastal megacities. The Indian Ocean Region (IOR), vital for 95% of India's trade, warms faster than global averages, driving sea-level rise that threatens ports like Mumbai and Chennai while fuelling cyclones and floods. Droughts in the Indo-Gangetic plains and erratic monsoons disrupt agriculture, sparking internal migrations that strain urban planning. Meanwhile, retreating Himalayan glaciers reduce Brahmaputra flows in Assam and could provoke disputes with Bangladesh over transboundary waters. Mass migrations from climate-hit Bangladesh could swell border pressures, blending humanitarian crises with security dilemmas.

Climate change may also escalate Indo-China rivalries, particularly along the Line of Actual Control (LAC). Glacier melt opens new military routes, enabling faster PLA mobilisation, while water scarcity from shared rivers like the Brahmaputra fuels asymmetric competition. China's infrastructure push under the Belt and Road Initiative (BRI) in vulnerable IOR states such as Maldives and Sri Lanka creates debt traps that undermine India's security.

Pakistan emerges as another critical actor in the context of the Indus Water Treaty, which has been held in abeyance.



Indus basin droughts, worsened by climate shifts, can provoke cross-border tensions. In the IOR, competition over chokepoints like the Strait of Malacca may intensify, with disrupted shipping lanes amplifying naval tensions. These risks erode India's strategic autonomy and increase reliance on QUAD partnerships with the US, Japan, and Australia.

In the most recent Climate Risk Index (CRI 2025, covering 1995–2024), India is ranked 9th globally for being affected by extreme weather events over the long term. Over the last three decades, India is estimated to have suffered around

80,000 deaths and economic losses of approximately USD 170 billion.



Indian defence must treat climate risk as a core security threat, reforming doctrine, basing, logistics and intelligence to withstand escalating environmental disruptions.

DEFENCE PLANNING

Indian defence must embed climate risk analysis in its planning. As per the Defence Acquisition Procedure 2025, resilient infrastructure has to be prioritised. The measures that need to be adopted could be:

- Integrate Climate into National Security Doctrine: Climate risk should be mainstreamed across defence strategy, threat assessments, and procurement.
- Climate Stress Tests and Scenario Building: Regular multi-year scenarios should simulate combined effects of extreme weather, migration, and economic disruption.
- Invest in Resilient Infrastructure and Flexible Basing: Upgrade critical bases for climate resilience and consider mobile or temporary basing options.
- Force Health Protection and Training: Update medical protocols and training schedules for heat and disease risks.
- Enhance Civil–Military Co-ordination: Build frameworks for rapid humanitarian deployments with interoperable structures.
- Diversify Logistics: Create redundant supply chains and climate-resilient hubs.
- Strengthen Climate Intelligence: Integrate satellite and environmental data into early warning systems; leverage ISA, CDRI, and BIMSTEC for regional co-operation.
- Promote Climate Diplomacy: Use defence channels for confidence-building measures.
- Reduce Carbon Footprint: Shift to green energy and resilient energy systems to reduce fuel vulnerabilities.

Climate change is reshaping the global geopolitical and security landscape faster and more profoundly than predicted. It magnifies historical grievances, disrupts economies, threatens sovereign territories, and accelerates human displacement. Defence establishments must now confront a strategic environment in which environmental instability shapes conflict patterns and national interests. As climate uncertainties escalate, adapting suitable military doctrines, capabilities, and international security frameworks becomes not only prudent but essential.

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QUICK INSIGHTS

- ***Climate change accelerates shortages, displacement, and instability in already fragile regions.***
- ***Climate shocks may overwhelm global capacity, escalating political tensions and ongoing conflicts.***
- ***Key regions—South Asia, the Middle East, and the Arctic—now face increasing climate-driven geopolitical friction.***
- ***Severe climate shocks may outpace global capacity, amplifying political stress and conflict.***
- ***India must embed climate risk into defence planning, foreign policy, and strategic partnerships for long-term security.***

IN THE SPOTLIGHT

EUROPE FEARS A "BAD PEACE" AS TRUMP PUSHES FAST UKRAINE DEAL



European officials warned that Washington's renewed push to end the Russia–Ukraine war could produce an "ugly deal" that freezes fighting without weakening Russia or securing lasting guarantees for Kyiv. The concern in Brussels is that a quick settlement could normalise Russia's gains, leave Ukraine exposed, and force Europe to carry more of the long-term security burden. The debate is also sharpening divisions inside Europe over deterrence, defence spending, and how hard to press for tougher sanctions if talks stall.

PUTIN LANDS IN INDIA SEEKING BIGGER ENERGY & DEFENCE ROLE



Russia signalled it wants to expand energy and defence exports and rebalance trade with India as President Vladimir Putin travelled for high-level talks. Moscow has leaned on India as a major buyer of seaborne crude even under Western sanctions, while New Delhi balances strategic autonomy with growing pressure from Washington over Russian oil. The visit underscored Russia's effort to lock in long-term markets and partnerships in Asia, and India's effort to secure supplies while protecting its wider diplomacy.

CHINA'S NAVAL ACTIVITY RAISES ALARM IN TAIWAN AND JAPAN



Taiwan and Japan voiced concern over unusually large Chinese military movements in nearby waters, adding to worries about escalation risks around Taiwan and the wider first island chain. The episode reinforced how "routine" deployments can still alter threat perceptions, raise readiness levels, and force tighter coordination between partners. For India and the Quad, the larger takeaway is regional: sustained Chinese naval activity is normalising a higher tempo of coercive presence, increasing the chance of miscalculation, and pushing neighbours to strengthen surveillance and interoperability. This is less about a single drill—and more about a strategic pattern that steadily compresses decision time in any future crisis.

CHINA–JAPAN MILITARY FRICTION SPIKES



Japan said a Chinese carrier strike group carried out intense air operations near Japan's southwest islands, as Tokyo and Beijing traded diplomatic barbs. Days later, the U.S. publicly backed Japan amid a dispute involving alleged Chinese radar targeting of Japanese aircraft, while China accused Japan of interference during training. The combined signal is escalation through "grey-zone" military encounters—short of open conflict but politically explosive. The repeated close-contact incidents harden alliances, justify higher defence budgets, and raise the probability that a tactical episode in the East China Sea becomes a strategic crisis affecting trade routes and Indo-Pacific stability.

TURKEY SAYS GAZA GOVERNANCE FIRST, DISARMAMENT LATER



Turkey's foreign minister argued that any lasting Gaza ceasefire arrangement must first settle governance and policing structures—before pushing Hamas disarmament. The statement reflects a wider diplomatic gap: some actors prioritise security demands and demilitarisation; others insist on political order and credible administration to avoid collapse. The core issue is sequencing—who governs Gaza, who provides security, and under what international guarantees. If sequencing is wrong, ceasefires risk becoming temporary pauses. The Doha message also shows Turkey positioning itself as a key voice in shaping post-war arrangements, alongside Qatar and other regional mediators.

RUSSIA DEMANDS DONBAS WITHDRAWAL FOR CEASEFIRE



A senior Kremlin aide said a ceasefire is possible only if Ukrainian forces fully withdraw from the Donbas region, framing territorial control as the precondition for any pause in fighting. He also suggested that security in contested zones could be handled by Russia's National Guard rather than the regular army—an idea with major implications for sovereignty, enforcement, and post-ceasefire stability. This is a clear signal of Moscow's red lines and negotiating posture: it seeks formalised outcomes on territory first, and security arrangements second. This stance complicates Western efforts to craft a deal that Ukraine can accept without appearing coerced.

EU NEARS DEAL TO USE FROZEN RUSSIAN ASSETS FOR UKRAINE



EU officials said they were close to a solution on the use of frozen Russian assets—many held in Belgium—to support Ukraine, with leaders expected to decide at a December summit. The debate is high-stakes: supporters argue it strengthens Europe's leverage and Ukraine's financing; opponents warn of legal risk, retaliation, and financial stability concerns. This is a major geopolitical-finance crossover—turning sanctions from "immobilise assets" into "mobilise value." If implemented, it could set a global precedent for how states treat frozen reserves in future conflicts, and reshape calculations in Beijing, Moscow, and other capitals about holding assets in Western jurisdictions.

RUSSIA AWAITS U.S. SIGNAL ON NEW START TREATY



Russia said it is still awaiting a formal U.S. response to President Putin's proposal to jointly stick to the New START treaty as it approaches expiry in early February 2026. New START is the last remaining pillar limiting deployed strategic nuclear warheads and delivery systems between the two nuclear superpowers. This is a core strategic-stability story: if New START lapses without replacement or interim restraint, the world may enter a looser arms-control era marked by higher uncertainty, faster force modernisation, and greater risk of misreading intent. The treaty's fate will influence deterrence politics from Europe to the Indo-Pacific.

UKRAINE, CHINA AND THE CRUMBLING CSTO SECURITY ORDER

GLOBAL AFFAIRS

As Russia prepares to assume the CSTO Chairmanship in 2026, the alliance stands at a crossroads of relevance, cohesion and power. Fractured by the Ukraine war, shifting Eurasian geopolitics, and the expanding influence of China, Iran and Turkey, the bloc now faces internal distrust and external competition that challenge its future as a credible collective security mechanism.



AMBASSADOR SRIKUMAR MENON, IFS (R)
FOR **NEWS ANALYTICS**

The recent summit meeting of the 'Collective Security Treaty Organisation' (CSTO), held in November 2025 in Bishkek, Kyrgyzstan, concluded with the reaffirmation of the bloc's commitment to regional security and political coordination. The Russian Federation was nominated to host the next summit meeting in Moscow in November 2026.

As Russia takes over the Chairmanship of the 6-member grouping from 1 January 2026 and seeks to reassert power in a multipolar Eurasia, it would be the right time to look back at the past five years of the international political landscape, which, at best, can be characterised as "unstable, fluid, and constantly changing".

International relations in today's world have been reconfigured in ways that would have been difficult to foresee in 2020. This unpredictability has been induced by the emergence of new power dynamics, amid the steady erosion of old structures of power and the dismantling of familiar diplomatic and strategic frameworks.

Shifting geopolitical trends have triggered changes in the post-Soviet dynamics and regional power plays. The emergence of the post-Cold War international order was

Russia's chairmanship begins as the CSTO faces internal fractures, fading cohesion, and a serious credibility test for collective security.



marked by the rise of new powers like China; the formation of new groupings like BRICS, SCO, CSTO, etc., thereby creating a multipolar world where smaller nations had space to diversify their aspirations. This holds true for the Eurasian Central Asian region as well.

CSTO – A HISTORICAL PERSPECTIVE

The CSTO forms part of Russia's vision for a multipolar Eurasia. It came into being – after the dismantling of the Soviet Union – as a natural progression of the 1992 Collective Security Treaty with former Soviet republics under the CIS framework.

The CSTO was set up in 2002, comprising Armenia, Belarus, Kazakhstan, Kyrgyzstan, Russia, and Tajikistan. Russia contributes more than 60 per cent of the budget, including troops, rapid reaction forces, and logistics support, while addressing hybrid threats like terrorism and extremism.



In effect, it is Russia's de facto military alliance, serving as an instrument of securing its "privileged interests". Informally labelled as the "Eurasian NATO", the CSTO outlines mutual defence commitments – including a collective response to external aggression.

Detractors have often described the CSTO as a vehicle for Russian hegemony – rather than a collective defence coalition like NATO. To put this in context, Russia, in the past, has been criticised for selectively invoking the Article 4 clause on 'external aggression' (similar to NATO's Article 5) to justify its interventions or presence in member states.

One such instance was in January 2022, when Russia led a rapid CSTO deployment of 2,500 troops – comprising mostly Russian paratroopers – to Kazakhstan to suppress widespread local unrest and protests over rising fuel prices. This helped to prop up the Kazakh regime of the day.

This was in sharp contrast to Russia's earlier declining to respond to Armenia's call for assistance during the Armenia–Azerbaijan conflicts in 2020 within the Nagorno-Karabakh region and in 2022, when Azerbaijani forces entered Armenian sovereign territory. Russia, on this occasion, was criticised for ignoring the CSTO article and choosing to 'maintain a balance with Azerbaijan and Turkey'.

PRESENT CONTEXT & CHALLENGES

Russia takes over the 2026 CSTO Chairmanship amid widening rifts and a drift in Central Asian collaboration. Armenia appears increasingly alienated than ever before. It finds itself vulnerable amid regional powers like Iran, Turkey and Russia, thus being forced to seek new security arrangements.

Armenia announced in February 2024 that it was freezing its participation in the CSTO, abstaining from activities and financial contributions and even considering withdrawal, over the bloc's failure to support it during the conflict with Azerbaijan. Armenia boycotted the November 2025 Bishkek summit – the second consecutive occasion it had opted to stay out. Russia now must address increasingly strident Armenian demands while projecting an appearance of unity in the bloc.

Let's look at the other members in the group. Belarus has been a reliable partner, hosting CSTO exercises and integrating its forces into Russian command structures, while Kyrgyzstan and Tajikistan are dependent on Russian bases in their territories for border security, specifically to ward off threats from across the Afghan border. Significantly, the Eurasian Economic Union (EAEU) has contributed to the economic interdependence of its members, which in turn strengthens loyalty towards Russia.



The Ukraine war exposed Russia's weakened military authority, limiting the CSTO's ability to respond to crises across Eurasia.

IMPACT OF THE UKRAINE WAR

The CSTO grapples with concerns over its very relevance, viability and existence, just as the world moves from a state

of ‘unipolar dominance’ to ‘multipolarity’ – primarily manifested by factors like the dominant rise of China, the eroding US hegemony, the instability in Afghanistan, and the impact of Russia's 2022 invasion of Ukraine.

Russia's ‘Ukraine war’ strategy will have a bearing on its upcoming Chairmanship of the CSTO, more so given the fact that the strategy does not conform to the security interests of its other partners.



The Ukraine war has aggravated existing tensions and posed challenges to the alliance's crumbling façade of unity – exposing significant differences of interest among CSTO members. What is significant is that the other five members did not offer military assistance to Russia, while all (except Belarus) distanced themselves from the conflict – either staying neutral or abstaining from UN votes critical of Russia.

The war has brought into sharp focus Russian military weaknesses, triggered crippling sanctions, and eroded its global stature, severely limiting its capacity to project power in its neighbourhood. This diminished capacity has left the CSTO unable to respond effectively to crises in the South Caucasus and Central Asia, pushing partners like Armenia, Kazakhstan, and Kyrgyzstan to seek closer ties with China and Turkey.

As CSTO influence shrinks, China, Iran and Turkey expand their strategic footprint across Central Asia.

EURASIAN PIVOT

China's dominance in the SCO at the expense of Russia is an indication of a subtle transition of power in the region. The Chinese approach has been to avoid visible CSTO rivalry and friction, and instead opt to go along with Russia's “cooperative hegemony”. Yet, the fact that Russia was forced to move large numbers of troops from its bases in Tajikistan to bolster its Ukraine campaign provides that much-needed opening for China to reach out to the Tajiks.

China played a prominent role at the Central Asia Summit in Astana in June 2025 – riding on its Belt and Road Initiative (BRI), to sell the idea of connectivity and stability to its partners – a step towards gradual usurping of Russian influence in the region.

As the CSTO’s influence seemingly diminishes in Central Asia, Iran finds itself with more space and manoeuvrability to strengthen its security ties and deepen cooperation with member states. With Russia getting distracted by its Ukraine campaign, and with fewer competing influences, Iran is now better placed than before to effectively extend its strategic reach, foster military and intelligence partnerships, and position itself as a key security actor in this geopolitically vital area, thereby enhancing its leverage across Central Asia’s evolving security landscape.

Similarly, Turkey has been rapidly expanding its leverage in Central Asia through the Organisation of Turkic States, the Middle Corridor trade route, forging new FTAs, and upgrading defence ties through drone sales and joint training. Turkey has offered Kazakhstan and Kyrgyzstan attractive options and alternatives to Russian support, besides pushing ahead with cultural initiatives and economic integration. This places Turkey as a key geopolitical player in the region, without getting into confrontation with Moscow.



LOOKING AHEAD: CSTO-2026

Russia assumes the new Chairmanship role on 1 January 2026, under the motto “Collective Security in a Multipolar World: Common Goal – Shared Responsibility.” In doing so, Russia, as one analyst put it, “will make a calculated bid to reclaim strategic influence” and continue to project itself as a viable counterweight to Euro-Atlantic structures. Undoubtedly, Russia will leverage the stewardship role to promote its military agenda in Ukraine, while aiming to minimise Western influence.

This offers Russia a window of opportunity to disentangle itself from the mess it finds itself in Ukraine, while at the same time exploiting the recent resurgence of active



multipolar outreach within the Eurasian region, driven by an increase in demand for munitions and armaments supply.

Russia would be keen to retain its influence on its CSTO partners, while being wary of the increasing sway and power being wielded by China through the Shanghai Cooperation Organisation (SCO).

In a multipolar Eurasia, the CSTO's viability will depend on Russia's ability to reform the bloc and cultivate a sense of shared Eurasian sovereignty. Moscow is likely to advance major rearmament programmes for member states and adopt a revised anti-terror strategy focused on blunting hybrid threats from Afghanistan, emphasising intelligence sharing and rapid-deployment capabilities. Russia will rely on its longstanding political, security, and economic ties with partners to maintain influence and reassert its leadership in Central Asia. It would prioritise deepening military integration, strengthening member-state security structures, enhancing training and air defences, and conducting regular joint exercises.

Analysts suggest that the CSTO under Russia's watch "may solidify as a tool of asymmetric dominance, rather than equitable partnership – reflecting the tensions of multipolar realignments".

As Chair of CSTO-2026, Russia has its work cut out. It faces the difficult, yet critical task of decisively reinforcing the group's operational coherence and strategic relevance, while preserving the alliance's solidarity, cohesion and sense of collective purpose.



(Ambassador Srikumar Menon, IFS (R.), 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 Herald.****)*

QUICK INSIGHTS

- ***Russia assumes CSTO leadership at a time of internal fractures and visibly declining regional unity.***
- ***Armenia's growing alienation exposes serious structural weaknesses in the bloc's promise of collective security.***
- ***The Ukraine war has significantly weakened Russia's military credibility and its authority across Eurasia.***
- ***China, Iran and Turkey are steadily expanding influence as the CSTO's relevance continues to erode.***
- ***The CSTO's future now hinges on Russia's capacity to reform the bloc and restore confidence.***



ZERO-DAY MARKETS AND AUTONOMOUS CYBER WEAPONS

HI-TECH

War has slipped beyond borders and battlefields into fibres, clouds, codes, and algorithms. In this invisible theatre, nations now compete for supremacy through exploits, malware, and artificial intelligence. The cyber arms race—driven by zero-day markets, state-backed hacker units, and autonomous digital weapons—is silently reshaping power, deterrence, and conflict in the 21st century.

NEWS ANALYTICS TECH DESK

War no longer begins with troop movements or missile launches. It now starts silently—inside servers, undersea cables, satellites, and cloud networks. The modern battlefield is digital, invisible, and relentless. Today's great powers compete not only across land, air, sea, and space, but also for dominance in cyberspace. This is the new Cyber Arms Race, where zero-day exploits, state-backed hacker units, and emerging autonomous cyber weapons are redefining geopolitical supremacy.

Unlike conventional arms races, cyber warfare is deniable, borderless, and continuous. Nations are no longer content with merely defending networks; they prepare to cripple adversaries' power grids, financial systems, military communications, satellites, and civilian infrastructure at machine speed. Cyber weapons have become the quiet equaliser—cheap to deploy, difficult to attribute, and devastating in impact.

ZERO-DAY EXPLOITS

At the core of this arms race lies a shadow economy built around zero-day vulnerabilities. A zero-day attack exploits an unknown or newly discovered software, hardware, or firmware vulnerability before developers can patch it, leaving systems exposed to immediate and serious security risks.. These vulnerabilities are the nuclear weapons of cyberspace: rare, powerful, and capable of bypassing even the most sophisticated defences. A thriving underground market now trades zero-days at astonishing prices. Premium exploits targeting smartphones, cloud systems, or industrial software can sell for anywhere between $500,000 and over $5 million.

While technology companies argue for disclosure to improve



security, intelligence agencies often hoard zero-days to preserve offensive advantage. This creates a dangerous paradox: the same vulnerabilities weaponised by states remain available to criminals, terrorists, and rival powers. The infamous Stuxnet attack that sabotaged Iran's nuclear centrifuges demonstrated how a single zero-day-based cyber weapon could achieve strategic outcomes once possible only through air strikes. Since then, zero-day stockpiling has become standard practice among cyber powers.



The most dangerous wars today begin without bombs, borders, or warnings — only code.

Cyber warfare today is not conducted by isolated hackers operating from dark corners of the internet. It is executed by organised, state-backed cyber units embedded within military and intelligence structures. The United States relies on its cyber command and intelligence agencies; China operates vast cyber formations under its strategic military forces; Russia deploys elite hacker units linked to its military intelligence; while Iran and North Korea, despite economic limitations, run highly effective cyber programmes focused on espionage and financial disruption.

These cyber forces routinely conduct:

- Strategic espionage.
- Industrial and defence theft.
- Psychological operations.
- Financial disruption.
- Infrastructure sabotage.

Unlike conventional forces, they operate below the threshold of declared war. This marks the beginning of an era of perpetual conflict—cyber operations unfolding daily, without ceasefires, peace treaties, or formal battlefields.

AUTONOMOUS MALWARE

The most dangerous shift now underway is the transformation from human-directed cyber attacks to autonomous cyber weapons powered by artificial intelligence. Traditional malware requires human planning, coding, and deployment. Today, AI-enabled malware can operate independently, scanning networks, identifying vulnerabilities in real time, modifying its own code to evade detection, selecting targets dynamically, and deciding when to strike.

This evolution pushes warfare into the realm of machine-speed conflict, where human decision-makers are increasingly bypassed. An autonomous cyber weapon deployed inside a hostile network may operate for months or even years without further commands—learning, adapting, spreading, and striking when optimal conditions arise. This is no longer hacking in the traditional sense. It is algorithmic warfare.

Artificial intelligence now fuels the cyber arms race at every level. Machine learning tools are deployed to generate deepfake identities for espionage, automate phishing campaigns at a global scale, predict human behaviour for social engineering, exploit new vulnerabilities within hours of discovery, and overwhelm defences through adaptive attacks.

Offensive AI has dramatically lowered the cost of mass cyber operations while increasing their speed and lethality. Today, a small team using AI-enhanced malware can inflict disruption that once required a national intelligence agency. This represents the democratisation of cyber destruction—where small states, non-state actors, and criminal syndicates can now wield strategic-level cyber power.



THE PRIME TARGET

The most alarming focus of the current cyber arms race is critical civilian infrastructure. Power grids, water systems, oil pipelines, airports, ports, railways, banking networks, hospitals, and satellite systems have all become frontline targets. Cyber attacks on these systems can trigger:

- Blackouts.
- Water contamination.
- Financial chaos.
- Transport paralysis.
- Medical system breakdowns.

No bombs fall. No armies advance. Yet entire populations are plunged into disorder within minutes. This vulnerability gives cyber warfare a terrifying asymmetric potential—a digitally weaker nation can still devastate a stronger adversary by targeting systemic fragilities instead of battlefield forces.

Nuclear deterrence worked because red lines were visible and attribution was clear. Cyber deterrence is far more unstable because attribution is uncertain and retaliation



Autonomous malware marks the shift from human warfare to machine-speed conflict.

ambiguous. When a power grid collapses due to a cyber weapon, fundamental questions arise instantly: Who launched it? Was it a state, proxy group, or criminal syndicate? Was it an act of war or sabotage? Does it justify military retaliation?

These unresolved questions paralyse decision-making and invite escalation through miscalculation. Cyber deterrence today operates in a strategic grey zone—one where punishment is uncertain, proportionality unclear, and escalation ladders dangerously undefined.

A BATTLEFIELD PROXY

Unlike conventional warfare, most of the digital battlefield is owned by private corporations, not governments. Cloud providers, telecom firms, financial institutions, satellite operators, and digital platforms now form the backbone of global cyber conflict—often unwillingly. A single cyber attack on a private data centre can cripple military command networks. An attack on a financial system can destabilise a national economy overnight.

States now pressure private companies to share vulnerabilities, assist offensive cyber research, provide surveillance access, and even embed technical backdoors into products. This blurs the boundary between national defence and corporate responsibility, creating profound ethical and legal dilemmas.

A growing dimension of the cyber arms race is the rise of digital mercenaries—private firms that sell surveillance tools, spyware, exploits, and disinformation services to the highest bidder. States now increasingly outsource:

- Political surveillance.
- Opposition tracking.
- Disinformation warfare.
- Infrastructure exploitation.

This privatises cyber conflict and erodes accountability. Unlike national armed forces, these actors operate in legal twilight zones, often beyond effective regulation or oversight.

UNCONTROLLED ESCALATION

Autonomous cyber weapons introduce a danger that conventional warfare has rarely faced: loss of human control. An AI-driven cyber tool can propagate beyond intended targets, misinterpret defensive measures as escalation, trigger automated counter-responses, and cascade into civilian networks unintentionally.

A single self-learning malware strain could jump from a military command network into hospitals, nuclear facilities, or aviation systems without authorisation. In such a scenario, escalation would unfold at machine speed—far faster than diplomacy, crisis management, or political leadership can respond.

Developing nations face the bleakest consequences of the cyber arms race. Many lack hardened infrastructure, cyber defence institutions, or trained personnel, yet they host critical resources, strategic shipping lanes, and growing digital economies. For these states, cyber warfare translates into



economic vulnerability, digital sovereignty erosion, foreign surveillance, infrastructure dependency, and increased political coercion.

Cyber vulnerability now functions as a new instrument of neo-imperial control—silent, deniable, and persistent.



FAILED ARMS CONTROL

Repeated international efforts to regulate cyber warfare have failed due to mistrust and verification challenges. Unlike nuclear weapons, cyber tools are easy to conceal, impossible to inventory, cheap to replicate, and constantly evolving. Verification becomes nearly impossible, and no state is willing to surrender offensive advantage out of fear that rivals will cheat. The result is a permanent security dilemma—everyone arms because everyone else is arming.

The fusion of AI and cyber weapons signals the arrival of algorithmic conflict—wars fought by code rather than soldiers. Future conflicts will be decided by whose AI detects intrusions first, whose malware adapts fastest, whose networks recover quickest, and whose digital deception is most convincing. Military supremacy is shifting away from tanks and fighter aircraft towards computational power, data dominance, and algorithmic resilience.

The cyber arms race may be the most unstable arms race humanity has ever entered. It is invisible, constant, deniable, and increasingly autonomous. Zero-day markets fuel it, state-backed hacker armies drive it, and autonomous malware accelerates it. There are no frontlines—only networks. No soldiers—only systems. No warnings—only sudden collapse.

Autonomous malware marks the shift from human warfare to machine-speed conflict.



If nuclear weapons once threatened civilisation through instant annihilation, cyber weapons now threaten it through systemic paralysis. The world is already engaged in this war—one that few fully understand. The question is no longer whether cyber war will shape future conflict. It already has. The only question is whether humanity can impose control over a battlefield that now thinks for itself.

QUICK INSIGHTS

- ***Zero-day exploit markets now function as the strategic currency driving modern cyber power and influence.***
- ***State-backed hacker units operate continuously below wartime thresholds, blurring peace and conflict boundaries.***
- ***AI-driven malware accelerates cyberattacks beyond human decision-making speeds, reshaping warfare at machine pace.***
- ***Civilian infrastructure has emerged as the primary frontline in today's escalating global cyber conflicts.***
- ***Cyber deterrence remains dangerously unstable due to attribution uncertainty and risks of automated escalation.***

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THE NEXT BIG

FUTURE INDIRECT FIRES SUMMIT 2026



The 2026 Future Indirect Fires Summit will take place on January 27–28, 2026 at The Westin Arlington in Arlington, Virginia, USA. This two-day defence conference brings together military and industry leaders to discuss the future of indirect fire systems, support technologies, munitions, and modernisation efforts. Participants will explore advancing precision, range, and battlefield survivability, with sessions covering key U.S. Department of Defence programs and emerging capabilities. Attendees can network with experts and gain insights into modern warfare challenges and solutions.

Official site: https://www.idga.org/events-futureindirectfires

UAV TECHNOLOGY USA 2026



The 5th annual UAV Technology USA conference will be held on February 2–3, 2026 in Arlington, Virginia, USA. This two-day event focuses on unmanned aerial systems (drones) and how they are used in defence and civil airspace. Experts from the military, government, and industry will share knowledge on the latest UAV technologies, strategic developments, and operational insights. Attendees can join briefings, panel discussions, and networking opportunities to learn about current trends and future capabilities in unmanned systems. This conference is ideal for professionals working with UAV programs and technologies.

Official site: https://www.smgconferences.com/defence/northamerica/conference/UAV-Tech-USA

SINGAPORE AIRSHOW 2026



The Singapore Airshow 2026 will be held from 3 – 8 February 2026 at the Changi Exhibition Centre in Singapore. It is one of Asia's largest aerospace and defence exhibitions, bringing together global industry leaders, government officials, military delegations, and companies to showcase the latest in aircraft, technology, and innovation. The event features exhibitions, strategic forums, flying displays, and networking opportunities for professionals in the aviation, space, and defence sectors. Attendees can learn about cutting-edge developments and build partnerships in the global aerospace community.

Official site: https://www.singaporeairshow.com/trade

THING

MRO MIDDLE EAST 2026



The MRO Middle East & Aircraft Interiors Middle East 2026 event will take place on 4 – 5 February 2026 at the Dubai World Trade Centre in Dubai, United Arab Emirates. This two-day aviation trade show brings together professionals from aircraft maintenance, repair, overhaul (MRO), and interior design to explore the latest industry technologies and trends. Exhibitors and visitors can attend exhibits, expert talks, and networking sessions to learn about new products, services, and innovations shaping aviation's future. The event is ideal for airline and aircraft supply chain professionals looking to connect and grow.

Official site: https://mromiddleeast.aviationweek.com/en/home.html

WORLD DEFENSE SHOW 2026



The World Defense Show 2026 will be held from 8 – 12 February 2026 in Riyadh, Saudi Arabia at the Riyadh International Convention & Exhibition Center. This five-day global defence exhibition brings together military leaders, government officials, industry experts, and technology innovators to showcase the latest advancements in air, land, sea, space, and security sectors. Attendees can explore cutting-edge equipment, attend discussions, and build international partnerships. The event highlights innovation and collaboration in the defence industry and supports growth in strategic technologies.

Official site: https://www.worlddefenseshow.com/en

SUBSEA SECURITY & DEFENCE 2026



The Subsea Security & Defence forum will take place from 10 – 13 February 2026 in Singapore at Park Royal Beach Road. This multi-day event brings together experts from military, industry, and government to discuss how to protect underwater infrastructure and improve subsea technologies such as surveillance, autonomous systems, and defence operations. Attendees will learn about the latest developments in underwater security, network with global professionals, and explore solutions for emerging threats below the sea. It is designed for those working in maritime security, defence, and critical infrastructure protection.

Official site: https://www.defenceiq.com/events-subsea-security-defence

SECURING THE SUPPLY CHAINS FOR INDIA'S GREEN ENERGY TRANSITION

ECOSYSTEM

The clean energy transition is not being won by technology alone but by control over minerals and their processing. While lithium, cobalt and rare earths dominate climate narratives, the real power lies in midstream capacity—refining, conversion and chemical processing. China's decades-long dominance in this invisible layer has rewritten global supply chains, exposing strategic vulnerabilities for the West and India alike.



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The public discussion about clean energy focuses mainly on technological advancements, but the actual barrier exists in geological resources and processing facilities, which decide who can construct the essential infrastructure of future energy systems. A limited group of minerals, including lithium, cobalt, nickel, graphite and rare earths, has transitioned from their previous industrial usage to become central elements in worldwide strategic planning.

The world believed that supply would automatically increase as EVs and renewables gained popularity. This assumption proved incorrect. Clean energy production depends on fragile supply networks, which operate under political risk and show uneven distribution patterns. The strategic advantage exists in locations that most people fail to recognise.

The ability to control mineral resources depends on processing capabilities rather than mining operations. Resource maps present misleading information to users. The presence of minerals in geological formations does not grant

Minerals do not create power—processing does. Whoever controls midstream controls the clean energy future.



control over resources. The ability to transform minerals into battery-grade materials determines who will gain control of the market. China established an unmatched position in the market through its development of processing facilities. The country controls 60–70% of worldwide lithium chemical production and 75% of cobalt processing, and all spherical graphite used in EV anodes. It also controls all rare-earth separation and magnet manufacturing operations.

The development of these capabilities spanned multiple decades. It required ongoing industrial support, environmental flexibility, substantial financial backing and specialised technical personnel. China started its development efforts before other nations did. Mining nations maintain physical control of their mineral reserves, but China maintains dominance in the processing operations that transform minerals into marketable products.



The West has launched its late-stage effort to develop its resources. The United States, Europe and Japan established their awareness of this vulnerability during the previous few years. The US government established the Minerals Security Partnership following the passage of the Inflation Reduction Act in 2022. The EU introduced its Critical Raw Materials Act in 2023. Japan started funding overseas refining operations and building up stockpiles of materials.

The political value of these actions remains significant, but industrial development requires immediate action because time works against us. The construction of new lithium refineries and rare-earth separation facilities requires five to ten years of development time before obtaining necessary environmental clearances. The Western world faces an impossible task to reduce its 20-year supply deficit into a single funding period because economic incentives lack the power to speed up engineering development.

The main problem lies in the concentrated nature of mineral resources rather than their actual scarcity. Multiple countries across the world possess lithium deposits. The same situation applies to cobalt and rare earth elements. The main reason for vulnerability stems from the fact that extraction and processing operations have become highly concentrated.

The Democratic Republic of Congo produces approximately 70% of the worldwide cobalt supply through operations that Chinese companies operate. China operates more than 90% of the global production facilities for anode-grade graphite processing. China maintains complete control over rare-earth separation operations. The Indonesian government implemented aggressive export policies, which transformed the global nickel market.

The system becomes extremely sensitive because of its concentrated nature. The EV market experiences rapid disruptions within weeks when regulatory changes, port disruptions or diplomatic conflicts occur. The actual level of system instability remains high even though minerals exist in abundant quantities throughout the world.

Resource nationalism has replaced free markets as the real driver of the critical minerals economy.

Resource nationalism has already shaped the transition through governmental actions. These essential materials have become strategic assets that governments now use to achieve their objectives. China demonstrated its ability to use graphite exports as a geopolitical tool through its 2023 export restrictions. The Indonesian government implemented a nickel export ban, which forced manufacturers to establish their operations within the country, thus transforming global supply patterns. State control over mineral resources has



become a recurring pattern throughout Latin America and Africa as countries implement new royalty systems.

The mineral market now operates under state control instead of market-based pricing mechanisms. The current situation demonstrates how political factors will interact with climate change initiatives.

India depends on foreign imports to support its green energy development plans. India plans to establish itself as a leading manufacturer of EVs, batteries and renewable energy systems. The country depends on foreign sources for all its lithium chemical imports, as well as cobalt and nickel sulphates and battery-grade graphite. The production of copper smelting depends heavily on imported concentrates.

The current supply situation creates an unavoidable condition that demands action. The upcoming ACC gigafactories need battery-grade lithium materials starting from the late 2020s, yet India lacks operational conversion facilities. The production of advanced cathode materials requires nickel and cobalt precursors, which all come from foreign processing facilities. The lack of external control over supply resources will create ongoing market instability for Indian manufacturing operations.



THE J&K LITHIUM FIND

The discovery of 5.9 million tonnes of inferred lithium resources in Jammu & Kashmir brought optimism about achieving domestic self-sufficiency. The geological classification of "inferred" serves as an initial assessment point instead of a solution for supply needs. The process of transforming this deposit into an operating mine needs multiple years of drilling work, feasibility assessments, environmental approvals and infrastructure construction.

The Indian market for battery materials will reach its peak before the current decade ends. The development of domestic supply will become important, but it will not support the construction of new manufacturing facilities at present.

India has started to expand its operations because of the identified supply gap. The Indian mining vehicle KABIL operates abroad to acquire lithium assets in Argentina while it seeks business alliances in Australia and Africa. The company needs to establish relationships with foreign suppliers to achieve supply chain diversification.

The acquisition of foreign assets creates fresh risks because governments can change policies, elections can trigger regulatory changes and royalty rate fluctuations, and local communities may oppose operations. The changing lithium regulations in Latin America and unstable investment environments in Africa demonstrate how overseas assets create new risks for businesses. The practice of risk distribution through diversification does not make risks disappear.

Without midstream control, India risks becoming a permanent consumer in the green economy, not a rule-maker.

INDIA'S MISSING MIDDLE

The most critical structural problem in India exists in the middle segment of its supply chain. The lack of domestic lithium conversion facilities prevents India from producing nickel and cobalt sulphates and anode and cathode precursor materials, which makes gigafactories dependent on imported chemicals. The ability to convert raw materials into usable inputs becomes essential even when overseas mines provide secure access to resources.

This supply chain segment requires substantial capital investment and complex technical expertise to generate strategic power. The early investments China made in midstream processing operations created its current market leadership position beyond its mineral resource size. The current supply chain operations do not link up with the new policies that India has established.



India has developed an encouraging set of policies which include a defined list of 30 critical minerals, centralised auctions, expanded GSI exploration and the PLI-ACC scheme for battery manufacturing. Each initiative is valuable. However, the development of new projects faces inconsistent progress. The exploration process advances at a fast pace, yet conversion facilities face challenges in securing funding. The manufacturing sector receives financial benefits but depends on materials that India lacks the ability to produce. The development of separate capabilities will continue when the mining sector does not operate in sync with processing and manufacturing activities.



A DIFFICULT TRUTH

Many people hold the false belief that the energy transition can proceed with minimal new extraction and minimal environmental impact. Current market projections indicate that new extraction activities will become necessary. The worldwide lithium market will experience more than fourfold growth during the next ten years. Market demand for nickel, cobalt and graphite will experience similar growth patterns. The process of recycling will start to produce meaningful amounts of materials, but this will not happen until the mid-2030s.

The avoidance of mining development will transfer environmental impacts to other nations across the world. The actual decision involves choosing between controlled extraction operations under proper governance and unregulated resource extraction methods.

The upcoming decade will establish market leadership through control of processing and refinement operations rather than mineral ownership. The ability to influence prices, secure supply, and advance battery and magnet technology development depends on midstream capacity.

The strategic frontier for India exists in this specific area. The development of chemical and metallurgical capabilities between mines and batteries will determine the value of overseas assets, domestic exploration and manufacturing incentives for India. The countries that achieve success in this sector will establish the rules for the green transition. Other nations will need to negotiate for access to these resources.

India maintains opportunities to influence its position in the market. The window of opportunity for India to shape its position continues to shrink because multiple nations now compete to establish their processing and refining operations within their borders. Strategic discipline combined with industrial policy coordination, specific funding and extended infrastructure development, will determine whether India establishes itself as a supply chain stabiliser or remains a large consumer without influence. The energy transition will reward organisations that achieve mastery of the midstream sector. The real battle for future dominance will take place at the midstream level instead of in distant mineral reserves.



(Dr Amit Dua is an Associate Professor at BITS, Pilani. He is a TEDx speaker and the author of books on Machine Learning and Machine Learning for Education. The views expressed are of the author and do not necessarily reflect the views of ***The News Analytics Herald.****)*

QUICK INSIGHTS

- ***Clean energy dominance depends on mineral processing, not just mining or technology leadership.***
- ***China controls most global midstream capacity for lithium, cobalt, graphite and rare earths.***
- ***Resource nationalism is reshaping mineral markets through export bans and state intervention.***
- ***India remains critically dependent on foreign processing for batteries and renewable manufacturing.***
- ***Midstream investment will determine future supply security, pricing power and strategic autonomy.***

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