

ICEP WEEKLY MAGAZINE

28 JULY TO 03 AUGUST, ISSUE 2025



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COVERAGE AREAS

ESSAY WRITING

*CURRENT AFFAIRS
PAKISTAN AFFAIRS
INTERNATIONAL RELATIONS
FOREIGN POLICY
GEOPOLITICS
GLOBAL ISSUES
COMPETITIVE EXAMS*

SOURCES

DAWN

*THE EXPRESS TRIBUNE
THE NATION
FOREIGN AFFAIRS
DIPLOMAT
ALJAZEERA
THE ECONOMIST*

GUIDE FOR READING THIS MAGAZINE

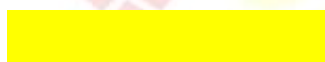
This magazine is designed with column-shaped layouts to accommodate maximum amount of content and enhance the reading experience. Each article is divided into two columns. It is recommended to read all articles by starting from the left column and proceeding to the right column for a good reading flow.

Colours used for highlighting indicates the following:

Used for main ideas/arguments



That contains some important data



Salient features of this magazine:

- ✚ three main sections: Editorials, International, and National articles.
- ✚ Each article is properly deconstructed; main ideas/arguments are highlighted in yellow and green Colours.
- ✚ Outlines of all articles
- ✚ Vocabulary in context
- ✚ Relevant graphics included
- ✚ Proper headings of each article and much more

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Editorial Section

All articles are taken from prestigious Pakistan
and world 's newspapers.

Farmers' distress

JULY 29, 2025

OUTLINE:

1. Current Crisis Highlighted by PKI

- Financial distress among farmers
- Decline in key crop exports (rice, corn, mango)
- Threat to food security due to wheat shortfall
- Rising rural poverty and potential instability

2. Structural Challenges in Agriculture

- Poor policy implementation and governance
- Water scarcity, low productivity, and inadequate infrastructure
- Climate change impacts: erratic monsoons, heatwaves
- Overreliance on major crops with minimal growth

3. PKI Demands

- Guaranteed 25% profit on crops
- Lower irrigation electricity tariffs
- Fair pricing for staple crops and vegetables
- Perceived rent-seeking elements in their proposals

4. Needed Reforms and Policy Shifts

- Transition to private sector-led, tech-driven model
- Long-term, systemic reforms over temporary relief
- Investment in rural infrastructure and R&D
- Crop diversification, mechanisation, and climate-smart practices

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THE Pakistan Kissan Ittehad has painted an alarming picture of Pakistan's agricultural sector, highlighting neglect, rising production costs and poor policy implementation. A combination of these factors, the PKI leaders said at a press conference, had caused unprecedented financial distress to farmers besides leading to a big decline in rice, corn and mango exports and, consequently, in foreign exchange earnings. They also warned of an increase in food insecurity due to a potential shortfall in the next wheat harvest — thanks to the abolition of the support price mechanism. Moreover, they predicted an increase in rural poverty and inequality, which could result in social and political instability. The PKI analysis underscores that the farm sector has reached its tipping point — even if the group's rhetoric is seen as politically motivated, and policymakers can question it. Despite some government interventions, the sector

continues to face major challenges such as water stress, low productivity, inadequate infrastructure, low levels of mechanisation, high production costs, poor seed quality, unregulated markets and flawed policymaking. Extreme weather events — such as erratic monsoons and heatwaves — induced by climate change have worsened these challenges in the last couple of decades. Hence, it is no surprise that agriculture has consistently lagged behind industry and services in driving economic growth as reflected by data for the past 15 years. The major field crops — wheat, cotton, maize, sugarcane and rice — dominate resources, but have delivered annual growth of just above 1pc. The same goes for fruit and vegetables. Growth in agriculture is being driven only by livestock.

The PKI has called for ensuring guaranteed 25pc profits on crop production, reduction in electricity tariffs for irrigation and fair market prices for staple crops and vegetables to help growers and revive yields. But one can detect in these demands a rent-seeking mindset. To unlock agriculture's full potential, the sector must shift from the traditional government-led model to a private sector-driven and tech-enabled model to become globally competitive. The government must focus on systemic reforms, not short-term packages, for increasing farm productivity and profitability. Policies should aim at improving rural infrastructure, market access, crop diversification, investment in R&D, farm mechanisation and promotion of climate-smart agriculture to ensure the sector's full contribution to economic growth ■

VOCABULARY IN CONTEXT

DIFFICULT WORDS:

1. **Rent-seeking** – Attempting to gain financial benefits through manipulation rather than productive activity.
2. **Systemic** – Relating to an entire system rather than individual parts.
3. **Diversification** – Process of varying products or activities to reduce risk.
4. **Climate-smart** – Agricultural practices adapted to mitigate climate change impacts.
5. **Flawed** – Having mistakes or weaknesses.
4. **Reached its tipping point** – Arrived at a critical or breaking moment.
5. **Lagged behind** – Fell behind or did not progress as fast as others.
6. **Called for** – Demanded or requested something.
7. **Help growers and revive yields** – Support farmers to increase production.
8. **Shift from...to** – Change from one system or method to another.

PHRASES:

1. **Painted an alarming picture** – Described a very worrying situation
2. **Led to** – Caused or resulted in something.
3. **Warned of** – Cautioned about a possible danger or problem.

IDIOMATIC EXPRESSIONS:

1. No idiom

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DECONSTRUCTION OF EDITORIAL

JARGON/TERMINOLOGIES:

Jargon/Terminology	Meaning
Pakistan Kissan Ittehad (PKI)	A farmers' alliance or union representing agricultural workers in Pakistan.
Support price mechanism	A government policy to guarantee minimum prices to farmers for their crops.
Production costs	Expenses incurred in growing crops, including seeds, labor, water, fertilizers, and energy.
Mechanisation	The process of introducing machinery to replace manual labor in farming.
Rent-seeking mindset	Seeking financial gains through manipulation or special privileges rather than productivity.
Climate-smart agriculture	Farming techniques designed to adapt to and mitigate the effects of climate change.

Crop diversification	Growing a variety of crops to reduce risk and improve soil health.
Foreign exchange earnings	Income earned from exports paid in foreign currency, important for a country's economy.

BROADER THEMES & APPLICATIONS:

1. **Agricultural Crisis** – The sector faces severe financial distress, declining exports, and food insecurity.
2. **Policy and Governance Failures** – Poor policy implementation and flawed decision-making hinder growth.
3. **Climate Change Impact** – Extreme weather events exacerbate existing agricultural challenges.
4. **Economic Lag in Agriculture** – Agriculture's growth remains slow compared to industry and services.
5. **Need for Structural Reforms** – Emphasis on private sector involvement, technology, and sustainable practices for revival.

KEY QUESTIONS:

1. What are the main factors causing financial distress to farmers according to the Pakistan Kissan Ittehad?
 2. How has the abolition of the support price mechanism affected food security in Pakistan?
 3. What major challenges does Pakistan's agricultural sector currently face?
 4. Why has agriculture lagged behind industry and services in driving economic growth over the past 15 years?
 5. What reforms does the PKI suggest to unlock the full potential of Pakistan's agriculture sector?
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PREPARATION

Pakistan-US cooperation

JULY 27, 2025

OUTLINE:

1. Improved Bilateral Relations

- Meeting between FM Ishaq Dar and US Secretary of State Marco Rubio signals warming Pakistan-US ties.
- Initiated by President Trump's lunch with Field Marshal Asim Munir.

2. Key Discussion Points

- Topics included trade, investment, counterterrorism, critical minerals, and the Pakistan-India conflict.
- Kashmir dispute mentioned as an area for continued US engagement.

3. Shift Toward Economic Partnership

- Emphasis on economic cooperation over security-focused ties.
- Dar highlighted progress on reducing 29% reciprocal tariffs from Trump-era policies.

4. Mutual Strategic Interests

- US is Pakistan's top export market and investor.
- Critical minerals seen as a new area of collaboration.

5. Future Outlook

- Potential for a durable, economically-driven partnership.

- Stronger economic ties could support cooperation in other sectors like counterterrorism.



THE meeting between Foreign Minister Ishaq Dar and US Secretary of State Marco Rubio has sparked cautious optimism that Islamabad and Washington may finally be turning a corner in their often-fraught relationship. The two sides appear ready to recalibrate their economic and strategic ties after years of diplomatic chill and disengagement.

The meeting between the top diplomats of the two countries is being widely interpreted as a formal culmination of a discreet thaw in bilateral ties — set in motion by the lunch President Donald Trump recently hosted for Field Marshal Asim Munir at the White House. It would not be wrong to say that Mr Trump's gesture helped lay the groundwork for the resumption of high-level diplomatic momentum between the two nations.

At Friday's meeting, the two sides are said to have discussed several issues — trade, investment, counterterrorism cooperation, critical minerals and mining, and the recent Pakistan-India clash, which the US president takes credit for stopping.

Indeed, Pakistan appears keen on securing continued US engagement in South Asia, particularly for help in the resolution of the long-standing Kashmir dispute. Yet, it is clear from Mr Dar's remarks, following his meeting with Mr Rubio, that Islamabad is now prioritising a more durable economic partnership with Washington.

"We reaffirmed our commitment to the long-term Pakistan-US partnership, with renewed focus on economic, trade, investment, IT/AI and counterterrorism cooperation," he posted on X. Speaking at the Atlantic Council, he revealed that a trade deal over the steep 29pc reciprocal tariffs imposed on Pakistan as part of President Trump's Liberation Day tariffs was "very close".

"It's not going to be months, not even weeks — I would say [just] days," he said. Mr Rubio, for his part, said the discussions focused on expanding bilateral trade and advancing collaboration in the critical minerals sector — an area of growing strategic interest for both sides.

The US remains Pakistan's single largest export destination, and American firms hold the biggest portfolio of fixed investment across key sectors of the country's economy, underscoring the long-term strategic

importance of enhanced trade and investment ties between the two nations.

That the latter appear willing to reset their ties around economic cooperation is encouraging and marks a departure from the days of security-centric engagements. It should lay the foundation for an enduring partnership. It must also be emphasised that the ongoing discussions over higher reciprocal tariffs afford policymakers a unique opportunity to build the future trajectory of bilateral ties on the basis of broader economic cooperation.

A partnership built on the long-term economic interests of the two countries should go a long way in deepening bilateral cooperation in other important areas, such as counterterrorism, as well ■

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VOCABULARY IN CONTEXT

DIFFICULT WORDS:

1. **Recalibrate** – To adjust or reset something, especially strategies or relationships, for improved results.
2. **Culmination** – The highest or final point of a process or series of events.
3. **Thaw** – A warming or easing of previously tense or frozen relations.

1. **Turning a corner** – *Meaning:* Starting to improve after a difficult or uncertain period.

PHRASES:

1. **Set in motion** – To start a process or series of events.
2. **Lay the groundwork** – To establish a foundation for something to develop or happen later.
3. **Take credit for** – To claim responsibility for a successful outcome or action.
4. **Reaffirm commitment to** – To strongly restate or confirm support or dedication to something.
5. **Focus on** – To direct attention and effort toward a specific area or issue.
6. **Build on** – To use something as a base for further development or progress.
7. **Go a long way** – To have a significant positive effect or influence over time.

IDIOMATIC EXPRESSIONS:

DECONSTRUCTION OF EDITORIAL

JARGON/TERMINOLOGIES:

Term / Jargon	Meaning
Cautious optimism	A guarded hope that something will improve or succeed, while being aware of potential risks.
Recalibrate	To adjust or revise something, especially policies or strategies, for better outcomes.
Diplomatic chill	A period of reduced or strained diplomatic interaction between countries.
Bilateral ties	Political, economic, or strategic relations between two countries.
Reciprocal tariffs	Mutual taxes imposed by two countries on each other's imports, often as trade measures.
Strategic interest	A nation's concern in areas or activities that significantly impact its long-term goals.
Critical minerals	Essential raw materials (like lithium, cobalt) vital for advanced technologies and industries.

Security-centric engagements

Diplomatic or strategic interactions focused mainly on defense and military cooperation.

BROADER THEMES & APPLICATIONS:

1. **Diplomatic Reengagement:** Used as a model for reviving strained international relations through high-level dialogue.
2. **Economic Diplomacy:** Highlights the shift from military to trade-focused foreign policy as a basis for alliances.
3. **Strategic Partnerships:** Emphasizes the value of long-term, mutual interests in fostering global cooperation.
4. **Regional Stability and Conflict Resolution:** Shows how global powers can influence peace building in conflict-prone regions.
5. **Trade Policy and Tariff Negotiation:** Demonstrates how resolving trade barriers can strengthen bilateral economic ties.

KEY QUESTIONS:

1. What factors contributed to the recent thaw in Pakistan-US diplomatic relations?
 2. How does Pakistan aim to shift its focus in bilateral ties with the United States
 3. What key issues were discussed during the meeting between Ishaq Dar and Marco Rubio?
 4. Why is the removal of the 29% reciprocal tariffs significant for Pakistan-US trade relations?
 5. In what ways could stronger economic cooperation influence other areas like counterterrorism?
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Time for Palestine

JULY 29, 2025

OUTLINE:

1. **France's Historic Recognition**
 - France to formally recognize the State of Palestine at the UN General Assembly.
 - Marks a shift in Western diplomatic stance and sets a precedent.
2. **Pakistan's Position**
 - Reaffirms support for a viable Palestinian state alongside Israel within pre-1967 borders.
 - Emphasizes peace is impossible without Palestinian statehood.
3. **UN Conference on Two-State Solution**
 - Three-day event co-hosted by France and Saudi Arabia with 123 countries and organizations.
 - Focus on ceasefire, humanitarian aid, and concrete progress toward Palestinian statehood.
 - Structured approach via eight working groups.
4. **Diplomatic Efforts and Challenges**
 - Pakistan's leadership role at the UN Security Council advocating diplomacy over conflict.
 - Opposition from Israel and the US highlights their growing isolation.
 - Over 140 UN members recognize Palestine; France's move expected to influence others.
5. **Call for Global Action**
 - Pakistan's long-standing backing of peace frameworks and UN resolutions.
 - Urges the international community to act decisively and morally.
 - Reinforces that the two-state solution must become a reality.



INTERNATIONAL momentum behind Palestinian statehood is growing. France's announcement that it will formally recognise the State of Palestine at the UN General Assembly in September marks a historic shift. It challenges the long-standing diplomatic inertia of Western powers, and sets a precedent that other influential nations can no longer ignore.

As the first G7 nation to make such a commitment, France has signalled that the two-state solution is no longer just a talking point. Pakistan, too, has reiterated its long-standing position — that peace in the Middle East is not possible without the recognition of an independent, viable Palestinian state, existing side by side with Israel within pre-1967 borders.

This week's three-day conference at the UN headquarters in New York, co-hosted by France and Saudi Arabia, brings together 123 countries and international organisations determined to revive the two-state framework.

Foreign Minister Ishaq Dar has rightly described the initiative as "very appreciable" and called for an immediate ceasefire in Gaza, the free flow of humanitarian aid, and substantive movement towards statehood for Palestine. The conference, organised around eight working groups, aims to move beyond symbolic support and chart a roadmap for concrete progress. It is an effort to inject structure, accountability and diplomatic urgency into a process that has for too long been stalled.

Pakistan has remained steadfast in its support for the Palestinian cause, grounded in international law and historical justice. As current president of the UN Security Council, it also chaired a recent debate on the situation in Gaza, where it again stressed that occupation, bombardment and displacement are no substitutes for diplomacy and dialogue. As Mr Dar noted "the real path forward is through dialogue and diplomacy" — a message that must resonate globally.

Opposition to the conference from Israel and the US — including attempts to dissuade others from attending — only underscores how isolated these actors are becoming. The world must no longer allow a veto or political pressure to derail a peace process grounded in justice. More than 140 UN member states already recognise Palestine. France's recognition is expected to trigger further

acknowledgements from European and Western countries. The momentum is real, and it must be sustained — not just in diplomatic halls but through tangible shifts in international policy and pressure.

For decades, Pakistan has backed frameworks such as the Oslo Accords, the Arab Peace Initiative, and relevant UN resolutions. All point to the same conclusion: the path to peace runs through statehood. And the recognition of Palestine is a right, owed to a people who have endured generations of occupation, blockade and statelessness. The time has come for the global community to act decisively, collectively and with moral clarity. The two-state solution must become a reality ■

The logo of the ICEP Network is a circular emblem. It features a central red shield with a white open book and a white hand reaching out. The shield is surrounded by a yellow laurel wreath. Below the wreath is a red banner with the text 'A Topper's Place' in white. The word 'ICEP' is written in yellow above the banner.

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VOCABULARY IN CONTEXT

DIFFICULT WORDS:

1. **Viable** – Capable of working successfully or feasible.
2. **Substantive** – Having a firm basis in reality; meaningful and important.
3. **Bombardment** – Continuous attack with bombs or artillery fire.

IDIOMATIC EXPRESSIONS:

No idiom

PHRASES:

1. **Set a precedent** – To establish an example that others will follow.
2. **Make a commitment** – To formally promise or dedicate oneself to a cause or action.
3. **Bring together** – To gather or assemble people or groups in one place.
4. **Move beyond** – To go past or overcome a certain stage or idea.
5. **Call for** – To demand or request something urgently.
6. **Point to** – To indicate or suggest something as important or relevant.
7. **Back frameworks** – To support established plans or agreements.
8. **Act decisively** – To take clear, firm, and effective action.

DECONSTRUCTION OF EDITORIAL

JARGON / TERMINOLOGIES:

Jargon / Terminology	Meaning
Two-state solution	A proposed resolution to the Israeli-Palestinian conflict envisioning an independent Israel and Palestine living side by side.
Pre-1967 borders	The territorial boundaries before the Six-Day War in 1967, often referenced in peace negotiations.
UN General Assembly	A main deliberative body of the United Nations where all member states have equal representation.
Ceasefire	A temporary stoppage of fighting or hostilities between conflicting parties.
Humanitarian aid	Assistance provided for humanitarian purposes, often in response to crises or disasters.
UN Security Council	A UN body responsible for maintaining international peace and security.
Veto	The power to unilaterally stop a decision or proposal, often held by

	permanent members of the UN Security Council.
Oslo Accords	Agreements between Israel and the Palestine Liberation Organization (PLO) aiming for peace and Palestinian self-governance.

BROADER THEMES AND APPLICATIONS:

1. Diplomatic Change and Momentum

Application: Nations can break long-standing political deadlocks by taking bold recognition steps, influencing global diplomacy.

2. Peace and Conflict Resolution

Application: Sustainable peace in conflict zones requires dialogue, diplomacy, and recognition of legitimate statehood.

3. International Law and Justice

Application: Upholding international law is essential for addressing historical injustices and guiding fair conflict resolutions.

4. Global Cooperation and Leadership

Application: Multilateral efforts and leadership, like those by Pakistan and France, are crucial to revive stalled peace processes

5. Humanitarian Concern and Accountability

Application: Ensuring humanitarian aid and ceasing violence are urgent responsibilities alongside political solutions in conflict areas.

KEY QUESTIONS

1. What historic shift does France's recognition of the State of Palestine represent in international diplomacy?
 2. Why does Pakistan emphasize the importance of recognizing an independent Palestinian state alongside Israel within pre-1967 borders?
 3. What are the main objectives of the three-day UN conference co-hosted by France and Saudi Arabia?
 4. How has Pakistan contributed to the Palestinian cause through its role in the UN Security Council?
 5. What challenges does the peace process face from opposition by Israel and the US, and how is the international community responding?
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PREPARATION

Betrayed citizens

JULY 31, 2025

OUTLINE:

1. Introduction:

- A society is judged by how it treats its most vulnerable; Pakistan fails its sanitation workers.

2. Discrimination and Marginalisation:

- Caste- and faith-based bias persists, mostly targeting minority communities.
- Job ads explicitly demand non-Muslim applicants.

3. Working Conditions:

- Unsafe, exploitative labor with no contracts, low wages, and no protective gear.
- Workers face verbal abuse, social exclusion, and physical danger.

4. Social Injustice and Violence:

- Deep-rooted stigma leads to severe consequences, including blasphemy allegations (e.g., 2023 Jaranwala incident).

5. Call to Action:

- End caste-based discrimination and exploitative hiring.
- Mechanize sewer cleaning, enforce labor protections, and ensure dignity and rights for workers.



THE measure of a society is how it treats its most vulnerable members — and by that measure, Pakistan is failing its sanitation workers. A new report by Amnesty International — which collaborated with the local human rights group the Centre for Law & Justice on the project — reveals the entrenched caste- and faith-based discrimination that continues to define this essential yet stigmatised profession. Despite being the backbone of urban hygiene, sanitation workers are routinely subjected to degrading treatment, dangerous working conditions and systemic exclusion. Many of these citizens belong to minority communities that placed their faith in the promise of equal rights in this country after Partition. They have been let down. Government ads openly require applicants to be non-Muslim for sanitation posts. Workers are often denied formal contracts, paid below minimum wage and made to clean sewers without protective gear. Many endure verbal abuse, exclusion from shared spaces

and even social segregation — all while risking injury or death on the job. A woman worker in Lahore captured the injustice simply: “They can cut us open and see that we bleed like them, so why do they call us these hateful words?” In some cases, the social marginalisation is so deep that workers have been vulnerable to blasphemy allegations, as witnessed in the 2023 Jaranwala violence sparked by accusations against two Christian sanitation workers.

The state must not only outlaw caste-based discrimination in its Constitution, it should also end discriminatory hiring practices and ensure equal protection under labour laws. Manual cleaning of sewers must be phased out and replaced with machinery. Regularisation of workers, provision of safety equipment and universal access to healthcare and social protections must follow. Until this country treats sanitation work with the dignity it deserves — and those who perform it with the respect they are owed — it will remain complicit in a silent, daily violence against some of its most vital citizens ■

VOCABULARY IN CONTEXT

DIFFICULT WORDS:

1. **Entrenched** – Deeply established and difficult to change.
2. **Stigmatised** – Viewed with shame or disapproval by society.
3. **Systemic** – Related to or affecting an entire system or structure.
4. **Segregation** – The act of keeping people apart based on race, religion, or caste.
5. **Marginalisation** – Pushing a group to the edge of society, limiting their rights or opportunities.
6. **Blasphemy** – Speaking or acting in a way considered disrespectful to religious beliefs.
7. **Regularisation** – Making a job or position official, usually with legal and employment rights.
8. **Constitution** – The fundamental legal framework that defines a country's political system and rights.

5. **Call out** – To publicly criticize or point out wrongdoing.
6. **Clean up** – To remove dirt or mess; here, refers to sanitation work.
7. **Open up** – To allow access or reveal something hidden (e.g., truth or wounds).
8. **Treat with (dignity/respect)** – To behave towards someone in a certain way.

IDIOMATIC EXPRESSIONS:

1. **Backbone of society** – The most essential or supportive part of a system or community.
2. **Turn a blind eye** – To deliberately ignore something wrong or unfair.

PHRASES :

1. **Let down** – To disappoint or fail to support someone.
2. **Cut open** – To slice or open something (often the body) to reveal what's inside
3. **Phase out** – To gradually stop using or doing something.
4. **Made to (do something)** – Forced or required to do a task.

DECONSTRUCTION OF EDITORIAL

JARGON / TERMINOLOGIES:

Term / Jargon	Meaning
Sanitation workers	Individuals responsible for cleaning streets, sewers, and waste systems.
Caste-based discrimination	Unequal treatment of people based on the caste they belong to, especially in South Asia.
Faith-based discrimination	Prejudice or unequal treatment due to a person's religion or belief system.
Systemic exclusion	Widespread and structured denial of rights or participation in society.
Minority communities	Groups within a population that are different from the majority in race, religion, or ethnicity, often facing discrimination.
Blasphemy allegations	Accusations of showing disrespect or insult toward religious beliefs, often with serious legal or social consequences in some countries.
Regularisation of workers	Making informal workers official employees with legal rights and benefits.

Labour laws

Legal rules that govern employment conditions, worker rights, and employer responsibilities.

BROADER THEMES AND APPLICATIONS:

1. **Social Injustice:** Unequal and unfair treatment of sanitation workers based on caste and faith.
2. **Labour Rights:** The need for fair wages, safety, and legal protections for sanitation workers.
3. **Religious and Caste Discrimination:** Bias in hiring and treatment based on religion and caste, especially against minorities.
4. **Government Negligence:** The state's failure to protect and uplift its most vulnerable citizens.
5. **Human Dignity:** The fundamental right of all workers to be treated with respect and equality.

KEY QUESTIONS:

1. How does caste- and faith-based discrimination affect sanitation workers in Pakistan?
2. Why are sanitation workers often denied basic labour rights and safety measures?

3. What role did the 2023 Jaranwala incident play in highlighting the vulnerability of minority workers?
 4. How do discriminatory hiring practices reflect systemic inequality in Pakistan?
 5. What steps does the report recommend to ensure dignity and protection for sanitation workers?
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PREPARATION

Sugar politics

JULY 31, 2025

OUTLINE:

- Competition Commission unable to enforce penalties.
 - Political entrenchment limits hope for real reform.
1. **Auditor General's Revelation**
 - Sugar mill owners made Rs300bn in extra profits after export permission.
 - Retail prices raised unfairly, showing deep governance failure.
 2. **Political Influence and Lack of Regulation**
 - Industry known for manipulating policy and evading taxes.
 - State protects powerful lobbies aligned with political elites.
 3. **Opaque Ownership Structure**
 - Real owners often linked to top officials, using proxies.
 - Government failed to disclose actual beneficiaries to PAC.
 4. **Policy Manipulation for Elite Gain**
 - Export-import cycle used to profit select families.
 - PAC demands full ownership disclosure for accountability.
 5. **Previous Investigations and Inaction**
 - 2020 sugar crisis inquiry found similar manipulation.
 - Recommendations for regulation were ignored.
 6. **Failure of Regulatory Bodies**



THE revelation by the auditor general of Pakistan that the sugar mill owners have stashed away a staggering Rs300bn in additional profits by heftily raising the retail prices of the commodity after the government granted them export permission is quite instructive. That the industry, notorious for wielding its enormous political clout to profiteer, manipulate policy and steal taxes, has pulled this off again is not just scandalous, it also exposes the deeper malaise of governance failure.

The state has yet again failed to regulate the markets and shield the consumers. The AGP's testimony before the Public Accounts Committee of the National Assembly underlines how the state often acts to protect the interests of the powerful business lobbies — especially when these interests align with those of the ruling political elite.

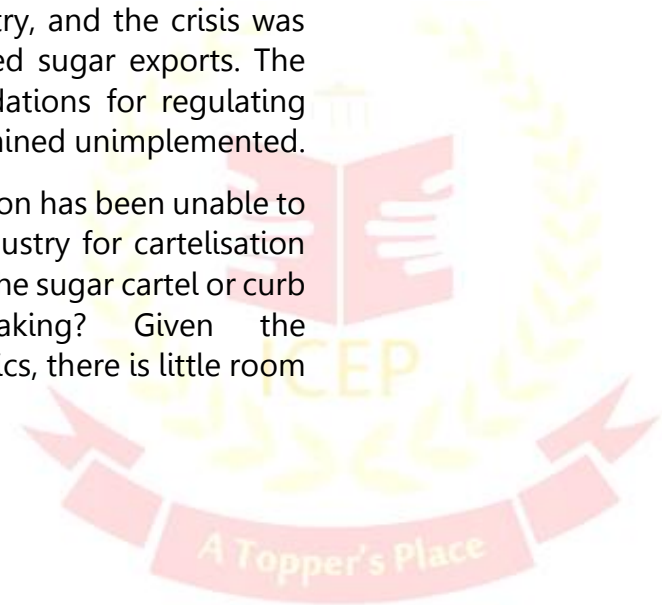
What makes the already murky business of sugar even murkier is the opacity around the actual ownership of the mills. It is widely known that a major share of the sugar industry is controlled by those who occupy top public offices and sit in parliament or are closely related to them. In certain cases, these interests are fronted by proxies to obscure the actual beneficiaries.

The government's inability, perhaps unwillingness, to give the committee anything beyond the names of the mills' directors reinforces suspicions that the decision to permit sugar exports was made to benefit entrenched political interests. Indeed, PAC chairman Junaid Akbar Khan stated that, more than just poor planning, the practice of first exporting surplus sugar and then importing it at a higher price reeks of deliberate policy manipulation to benefit a group of 42 families. The PAC's demand for full disclosure of ownership of the sugar mills, therefore, is justified. People have every right to know who, especially among the politically exposed, profits at their expense when public policy is formulated to serve private business interests.

While the PAC is to be commended for demanding transparency, this is not the first time the sugar industry has come under scrutiny for its political clout and policy manipulation. The sugar crisis marked by drastic retail price increases and domestic shortages due to exports in 2020 under the Imran Khan administration had led an inquiry commission that came to similar conclusions. The probe had found evidence of manipulation and

profiteering within the sugar industry, and the crisis was attributed to policies that subsidised sugar exports. The commission had made recommendations for regulating the sugar trade, but these have remained unimplemented.

Likewise, the Competition Commission has been unable to recover fines it imposed on the industry for cartelisation and price fixing. Can the PAC break the sugar cartel or curb millers' influence in policymaking? Given the entrenchment of the owners in politics, there is little room for optimism ■



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PREPARATION

VOCABULARY IN CONTEXT

DIFFICULT WORDS:

1. **Profiteering** – Making excessive profits unfairly or dishonestly.
2. **Cartelisation** – Agreement among firms to fix prices and limit competition.
3. **Opacity** – Lack of transparency or clarity.
4. **Manipulation** – Controlling something cleverly or unfairly for personal gain.
5. **Entrenchment** – Deeply established and hard-to-remove power or influence.
6. **Subsidised** – Financially supported by the government to lower costs.
7. **Governance** – The act or process of governing or overseeing policies.
8. **Accountability** – Being responsible and answerable for actions or decisions.
4. **Cover up** – To hide the truth about something, especially a wrongdoing.
5. **Give away** – To reveal or disclose information, often unintentionally.
6. **Reek of** – To strongly suggest something unpleasant or dishonest.
7. **Come under (scrutiny)** – To be subjected to critical examination or investigation.
8. **Break up** – To dismantle or end a group or organization, like a cartel.

IDIOMATIC EXPRESSIONS:

1. **Feather one's own nest** – Meaning: To use one's position or power to enrich oneself dishonestly.

PHRASES:

1. **Stash away** – To secretly store or hide something valuable.
2. **Pull off** – To succeed in doing something difficult or dishonest.
3. **Act on** – To take action based on information or advice.

DECONSTRUCTION OF EDITORIAL

JARGON/TERMINOLOGIES:

Term	Meaning
Auditor General (AGP)	The chief financial watchdog responsible for auditing government spending and revenues.
Public Accounts Committee (PAC)	A parliamentary body that oversees public expenditures and holds the government accountable for financial decisions.
Political Clout	Significant influence or power in political decision-making.
Profiteering	Making unfair or excessive profits, often during crises or through manipulation.
Policy Manipulation	Deliberate alteration of public policy to serve private or political interests.
Cartelisation	Collaboration among businesses to control prices or market share, limiting fair competition.

Price Fixing	An illegal agreement among competitors to set prices at a certain level, rather than letting competition determine them.
Subsidy/Subsidised Exports	Government financial support to make exports more competitive, often at the cost of local consumers.

BROADER THEMES AND APPLICATIONS:

1. **Governance Failure:** Weak oversight allows powerful elites to manipulate markets unchecked.
2. **Political-Business Nexus:** Overlapping political and business interests compromise public policy
3. **Lack of Transparency:** Obscured ownership structures prevent accountability in key industries.
4. **Policy Manipulation:** Export-import policies are crafted to serve elite interests, not public welfare.
5. **Regulatory Incompetence:** Institutions like the Competition Commission fail to enforce rules and penalties.

KEY QUESTIONS

1. Why has the government failed to regulate the sugar industry and protect consumers despite repeated crises?
2. What role does political influence play in the manipulation of sugar trade policies in Pakistan?
3. Why is the true ownership of sugar mills still hidden from public scrutiny and oversight bodies like the PAC?
4. What became of the 2020 inquiry commission's recommendations on sugar trade regulation, and why weren't they implemented?
5. Can the Public Accounts Committee realistically challenge the entrenched power of the sugar cartel in policymaking?

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International Articles Section

All articles are taken from prestigious Pakistan
and world 's newspapers.

Taiwan-US Ties Are Becoming a Political Headache for the Lai Administration

Brian Hioe

August 5, 2025

OUTLINE:

1. Setbacks for the Lai Administration

- **Recall Vote Failure** (July 26): First round of "Great Recall Movement" unsuccessful.
- **U.S. Tariffs Imposed**: 20% tariffs from Trump administration; higher than Japan and South Korea.

2. Trade Negotiations and Tariff Controversy

- **Initial 32% Tariff Threat**: Trump's April announcement caused concern in Taiwan.
- **Lai Administration's Efforts**:
 - Trade talks led by Vice Premier Cheng Li-chiun.
 - Op-ed by Lai in *Bloomberg* calling for stronger Taiwan-U.S. ties.
- **Outcome**: 20% tariff finalized—worse than expected.
- **Public and Political Reaction**:
 - KMT accused Lai administration of failure and lack of transparency.
 - Lai admin insisted talks are ongoing, hoping for reductions.

3. Canceled U.S. Stopover

- **Planned South America Trip**: Included U.S. transit stop; entire trip canceled.
- **Official Denials**: Both U.S. and Taiwan denied cancellation claims.
- **Political Fallout**: Viewed as U.S. bowing to China; criticized by Nancy Pelosi.

4. Domestic Political Implications

- **Growing U.S.-skepticism**: Fears over U.S. reliability in a crisis with China.
- **KMT-DPP Tensions**:
 - KMT calls for transparency, national conference, and relief funding.
 - Likely to use forums to attack DPP politically.

5. Looking Ahead

- **Midterm Pressure**: Tariff impact on economy could hurt Lai politically.
- **Future Diplomacy & Relief Measures**: Crucial for Lai to restore confidence and manage Taiwan-U.S. relations.



Late July brought a series of setbacks for the Lai administration of Taiwan. After the disastrous failure of the first round of recall votes of the "Great Recall Movement" on July 26, the Trump administration in the United States imposed 20 percent tariffs on Taiwan, part of a wider announcement of tariffs on major trading partners. More unusually, a planned trip by President Lai Ching-te that would have involved a stopover in the United States was canceled, reportedly because the Trump administration did not want to upset China as the two sides pursue trade negotiations.

The Lai administration probably had hoped for a different series of events to buoy its July and August: successes in terms of Taiwan-U.S. diplomacy that could carry the Lai administration through the recall season (the second

round of recall voting is scheduled for late August). But its vision was not to be. In U.S. President Donald Trump's initial "Liberation Day" tariff announcement in early April, Taiwan was hit with 32 percent tariffs. This led to strong reactions in Taiwan, particularly as this was only slightly lower than China's tariff rate of 34 percent. Trump later announced a "pause" on the higher tariff rates, inviting governments from around the world to negotiate deals. Taiwan was one of many seeking to lower the tariff rate through talks with Washington.

Ahead of the voting date for the recall, however, rumors arose that the United States would continue with its plans for a 32 percent tariff rate on Taiwan. The claims continued to circulate online, even though they were denied by the American Institute in Taiwan (AIT), which functions as a de facto U.S. embassy in Taiwan in the absence of official diplomatic ties. AIT stressed that news on tariff rates would come through official channels.

The online rumors implied that the Lai administration had no success in convincing the United States to reduce the tariff rate. The claims were picked up by Kuomintang (KMT) politicians, such as pan-Blue commentator Jaw Shaw-kong, who also served as the KMT's vice presidential candidate in 2024 elections, and KMT party chair Eric Chu.

Contrastingly, Lai administration trade officials stated that Taiwan expected to see a tariff rate that was below 25 percent, in line with what Japan and South Korea received.

Lai administration officials also denied allegations from KMT legislator Chang Chia-chun that Taiwan had already been informed of a tariff rate but was seeking to keep it secret ahead of the recall.

The Lai administration appeared to hope that it could tout a preferential tariff rate as a political victory, potentially influencing the recall vote. Vice Premier Cheng Li-chiun was dispatched to the United States for four rounds of trade talks. An op-ed in Bloomberg published by Lai in April, suggesting that the United States and Taiwan should deepen economic connections for greater prosperity was also seen as an attempt to convince Washington to lower tariffs.

The choice of Cheng for trade negotiations is notable. Cheng, who previously served as minister of culture under the Tsai administration, is considered a Lai loyalist. She was previously considered a contender against Hsiao Bi-khim, best-known as Taiwan's representative to the U.S. during the Tsai administration, as Lai's vice presidential candidate. It is possible that in the event of a future cabinet reshuffle, Cheng will become the next premier.

Ultimately, the Lai administration did not see tariff rates for Taiwan announced ahead of the July 26 recall vote, even though it touted that it was near closing a deal. And when the rate was announced, Taiwan's 20 percent tariffs were higher than the rates imposed on Japan and South Korea – both at 15 percent. Taiwan's tariff rate is also higher than Southeast Asian economies such as Cambodia

and Thailand, which both received 19 percent. This was a blow to the Lai administration.

The Taiwanese public is mostly focused on the numbers and appears unconvinced that 20 percent was the best that could be secured while still protecting Taiwanese industries. U.S. trade negotiators were reportedly placing significant pressure on Taiwan to make further concessions. To this extent, there has been relatively little discussion in Taiwan of what Japan and South Korea offered to receive lower tariff rates – for example, Trump's claims that Japan would directly pay the U.S. funds to be used for investment at the discretion of the Trump administration – or other uncertainties about tariff negotiations. Most reporting has focused on the percentage of tariffs that Taiwan would receive.

As pan-Blue figures accuse the government of failing in its trade negotiations, the pan-Green camp has sought to recenter political attacks on the pan-Blue politicians who claimed on the basis of mysterious inside sources that Taiwan would have a 32 percent tariff rate. The Lai administration has also sought to emphasize that trade talks with the United States are ongoing, and that Taiwan may see a further reduction in tariff rates.

The KMT is demanding that the Lai administration clarify what it means by saying that trade negotiations are ongoing. The KMT has also alleged that trade negotiations are lacking in transparency and should be disclosed to the public, though the party's leaders probably knows well

that it is standard practice for such trade negotiations to be kept secret. The KMT is currently calling for a national conference to be held on the tariffs. There is a rare opportunity for bipartisan cooperation if both the KMT and the Democratic Progressive Party (DPP) agree to pass special funding to deal with the economic impact of the tariffs. But the KMT may simply use the national conference as a political opportunity to attack the Lai administration, perhaps through interrogating DPP politicians, or attack the Executive Yuan's proposed budget as failing to do enough for affected industries. This has generally been the pattern in the last two years, with the KMT staging public walkouts during reports to the legislature by Premier Cho Jung-tai, after calling for Cho to make such reports. There is also a recurring pattern of one-upmanship between the KMT and DPP legislative caucuses when it comes to relief funding for disasters.

Amid accusations of "failed" trade talks with Washington, there came another blow to the Lai administration. In late July, reports began to appear in the international press that Lai's planned August stopover in New York was off. The Lai administration and U.S. State Department denied the veracity of such reports, with the Ministry of Foreign Affairs pointing out that no trip had been formally announced, so it couldn't have been canceled. However, it was known that Lai had planned to visit Belize, Guatemala, and Paraguay, Taiwan's diplomatic allies in South America. The Guatemalan government later claimed that the trip was off due to the impact of typhoons on Taiwan.

Taiwanese presidents cannot pay formal visits to the United States, due to the lack of formal diplomatic ties. However, it's long been standard practice for them to make "stopovers" – essentially transiting through major U.S. cities en route to visit Taiwan's diplomatic allies. China vociferously protests every such transit by a Taiwanese president, something the U.S. government has always ignored – until now.

Among those to criticize the Trump administration for reportedly rejecting Lai's stopover request was former U.S. Speaker of the House Nancy Pelosi, who traveled to Taiwan in August 2022. Pelosi, as well as others, have criticized the Trump administration for the optics of throwing Taiwan under the bus in order to please China. The underlying suggestion would be that the Taiwan-U.S. relationship is up for negotiation.

The shock of U.S. tariffs and the cancellation of the Lai administration's planned stopover is likely to amplify skepticism about whether the United States will support Taiwan in the event of a Chinese invasion. What has been termed "U.S.-skeptical rhetoric" has been on the rise in Taiwan in past years, as embraced by pan-Blue politicians such as Jaw and others.

The cancellation of Lai's trip is a slap in the face, given that past Taiwanese presidents have been allowed to transit in the United States. The importance of the stopover visit can be seen through the fact that the entire trip was cancelled

when a U.S. transit was not possible. Yet there is opportunity to remedy this if the trip is later rescheduled. Even Pelosi's visit to Taiwan was called off once, due to the then-House speaker contracting COVID-19. That raised questions about whether the trip would actually occur – and it eventually did.

That being said, the impact of the tariffs may turn out to have a larger impact for the Lai administration, particularly as midterm elections approach. As agriculture and industry feel the heat, the Lai administration will be under pressure to not only come up with relief measures but also manage the Taiwan-U.S. relationship – otherwise it will again face punishment at the polls ■



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VOCABULARY IN CONTEXT

DIFFICULT WORDS:

1. **Setback** – A reversal or defeat that delays or hinders progress.
2. **Tariffs** – Government-imposed taxes on imported or exported goods.
3. **Recall** – A political process to remove an elected official from office before their term ends.
4. **Transit** – The act of passing through a place, especially during a journey.
5. **Concessions** – Compromises made to reach an agreement, often by giving up something.
6. **Opaque** – Not transparent; difficult to understand or lacking clarity.
7. **Diplomatic** – Related to managing international relations between governments.
8. **Skepticism** – Doubt or disbelief, especially toward accepted ideas or claims.
4. **Come up with** – To produce or suggest an idea, plan, or solution.
5. **Pick up (on)** – To notice or react to something; in this case, to adopt or spread (rumors).
6. **Turn out** – To end up being a certain way or having a certain result.
7. **Focus on** – To concentrate attention or effort on something.
8. **Fall apart** – To fail completely or collapse (used figuratively, e.g., a plan or situation).

IDIOMATIC EXPRESSIONS:

1. **A slap in the face**: An unexpected insult or humiliation, especially when one expects support or fairness.

PHRASES:

1. **Bring about** – To cause something to happen.
2. **Carry through** – To support or sustain someone or something through a challenge.
3. **Give up** – To surrender or stop making an effort.

DECONSTRUCTION OF ARTICLE

JARGON/TERMINOLOGIES:

Term / Jargon	Meaning
Recall vote	A democratic process in which voters can remove an elected official from office before the end of their term.
Tariff	A government-imposed tax on imported goods, often used to regulate trade or protect domestic industries.
Stopover	A brief stay in a location (e.g., a U.S. city) while en route to a final destination, often used diplomatically by Taiwanese presidents.
Pan-Blue camp	A political alliance in Taiwan led by the Kuomintang (KMT), generally favoring closer ties with China.
Pan-Green camp	A political alliance in Taiwan led by the Democratic Progressive Party

	(DPP), generally favoring Taiwan independence.
Trade negotiations	Formal discussions between countries aimed at reaching agreements on trade terms such as tariffs, quotas, and regulations.
Cabinet reshuffle	A change in the composition of government ministers, usually made by the head of government.
De facto embassy	An unofficial representative office that functions like an embassy in the absence of formal diplomatic relations (e.g., AIT in Taiwan).

BROADER THEMES & APPLICATIONS:

1. **International Trade Tensions:** Reflects how geopolitical factors (e.g. U.S.-China relations) shape global trade policies. Other countries, especially export-driven economies, face similar risks.
2. **Domestic Politics vs. Foreign Policy:** Shows how governments try to leverage foreign policy achievements to influence internal political outcomes, such as elections or recall votes.

3. **Diplomatic Symbolism and Strategy:** Stopovers and canceled visits can carry major symbolic weight in international relations. This is common in regions with disputed sovereignty or limited recognition.
 4. **Information Warfare and Political Narratives:** Highlights how rumors, misinformation, and selective leaks can be weaponized by opposition parties. This is increasingly common in global democracies.
 5. **Public Perception and Policy Accountability:** Demonstrates the growing importance of public perception in judging government performance, especially in economic matters like tariffs and international deals.
-

KEY QUESTIONS:

1. How has the imposition of U.S. tariffs impacted the domestic political standing of the Lai administration in Taiwan?
2. To what extent are trade negotiations influenced by broader geopolitical considerations, such as U.S.-China relations?
3. What are the implications of the U.S. canceling Lai's stopover for Taiwan's diplomatic positioning and perception of U.S. support?
4. How are domestic political parties in Taiwan leveraging international developments for partisan advantage?
5. Can bipartisan cooperation emerge in Taiwan to address the economic impact of tariffs, or will political polarization continue to dominate the discourse?

The Quad in an 'America First' World

Aparna Pande

August 01, 2025

OUTLINE:

1. Introduction to the Quad

- The Quad includes the U.S., Australia, India, and Japan.
- Central to U.S. Indo-Pacific diplomacy but not a security lynchpin.
- Seen as a nonsecurity, ad hoc grouping.

2. U.S. Strategic Priorities

- Second Trump administration favors selective hard power.
- Quad not yet delivering tangible safety, strength, or prosperity to the U.S.
- Valued for its **potential** to counterbalance China's influence.

3. Origins and Evolution of the Quad

- **2004**: Formed informally for tsunami-related humanitarian aid.
- **2007**: Abe Shinzo proposes a formal grouping of four democracies.
- **2008**: Group fizzles out.
- **2017**: Revived under Trump due to concerns about China.
- **Post-2017**: Expanded under Biden with summits and broader cooperation.

4. Achievements and Limitations

- Success as a regional minilateral focused on non-military cooperation.
- Areas of cooperation: health, tech, infrastructure, maritime security, etc.
- Still **limited in its ability** to counter China's assertiveness.



The Quadrilateral Security Dialogue, or the Quad, is the centerpiece of U.S. Indo-Pacific diplomacy, but contrary to the desire of American strategic planners, it is far from being the lynchpin of regional security. The Quad brings together three Asian democracies – Australia, India, and Japan – and the resident external power, the United States. It is an ad hoc nonsecurity grouping that has retained attention even though the second Trump administration views multilateralism, multilateral institutions, and security alliances with suspicion.

The United States is recalibrating its global involvement based on selective hard power considerations. The Quad, however, is not yet a hard power actor. In his confirmation hearing in January 2025, Secretary of State Marco Rubio

delineated the second Trump administration's policymaking priorities based on three questions: "Does it make America safer? Does it make America stronger? And does it make America more prosperous?" The Quad has, so far, not made the U.S. safer, stronger, or more prosperous. But the administration continues to see it as important, primarily because of its potential in containing China's rising power and influence. The Quad countries encompass over 2 billion people and together account for one-third of global gross GDP; their combined efforts would go a long way toward countering China.

Quad's Origins

The Quad was first forged, informally, in the wake of the 2004 Indian Ocean earthquake and tsunami when Australia, India, Japan, and the United States coordinated to mobilize humanitarian assistance and disaster relief across the region. Three years later, in 2007, the idea of the Quad as a standing group was conceived, with late Japanese Prime Minister Abe Shinzo pitching the concept of these four democracies working together to strengthen regional stability based on shared norms and interests.

After a fizzling out in 2008, the Quad grouping was resuscitated in 2017 under the first Donald Trump administration, amid growing concerns about China's aggressive economic and military expansion in the region. The subsequent Biden administration then further elevated the Quad, adding annual leader-level summits to the existing foreign ministers' dialogue. Both the frequency of annual meetings and the breadth of agenda items significantly expanded.

If the goal was to create an Indo-Pacific minilateral, the Quad can be counted as a success. In under a decade, the four countries have enhanced cooperation beyond humanitarian assistance and disaster relief (HADR) into health security, debt management, regional connectivity and infrastructure, critical and emerging technologies, and maritime security.

If, however, the aim was to create a minilateral that counters China's increasingly assertive posture in the Indo-Pacific, the Quad has a long way to go ■



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VOCABULARY IN CONTEXT

DIFFICULT WORDS:

1. **Lynchpin** – A central or most important element that holds everything together.
2. **Ad hoc** – Formed or done for a specific purpose, often temporarily.
3. **Multilateralism** – A system in which multiple countries work together on global issues.
4. **Recalibrating** – Adjusting or changing something to improve its function or direction.
5. **Delineated** – Clearly described or outlined in detail.
6. **Assertive** – Confidently aggressive or forceful, especially in pursuing one's goals.
7. **Minilateral** – A small group of countries cooperating on specific regional or global issues.
8. **Fizzling out** – Gradually losing strength, energy, or effectiveness until it ends.

Hold all the cards: To be in a strong or controlling position in a situation.

IDIOMATIC EXPRESSIONS:

No idiom

PHRASES:

1. **A long way to go:** Much progress still needs to be made before achieving a goal.

DECONSTRUCTION OF ARTICLE

JARGON & TERMINOLOGIES:

Term / Jargon	Meaning
Quadrilateral Security Dialogue (Quad)	A strategic forum involving the U.S., India, Japan, and Australia aimed at regional cooperation, especially in the Indo-Pacific.
Indo-Pacific	A geopolitical region combining the Indian Ocean and Pacific Ocean areas, key to global trade and security.
Lynchpin	A vital element that holds different parts together; central to the functioning of a system.
Ad hoc	Formed or arranged for a specific purpose or situation, often temporary and not institutionalized.
Multilateralism	A system in which multiple countries coordinate and cooperate on global or regional issues.

Hard power	The use of military or economic force to influence other countries' behavior.
Humanitarian Assistance and Disaster Relief (HADR)	Aid and emergency support provided in response to crises like natural disasters.
Minilateral	A small group of countries working together on specific issues, usually more flexible than multilateral organizations.

BROADER THEMES AND APPLICATIONS:

1. **Strategic Alliances and Diplomacy:** International Relations studies, foreign policy design, regional cooperation mechanisms.
2. **Balance of Power and Geopolitics:** Security studies, geopolitical strategy, Indo-Pacific defense planning.
3. **Multilateralism vs. Minilateralism:** Global governance models, institutional effectiveness, policy efficiency.

4. **Soft Power vs. Hard Power:** Power theory in politics, development diplomacy, military vs. non-military tools.
 5. **Humanitarian and Regional Cooperation:** Disaster response frameworks, public health cooperation, infrastructure projects.
-

KEY QUESTIONS:

1. What is the main strategic purpose of the Quad in U.S. Indo-Pacific diplomacy?
 2. Why does the second Trump administration continue to support the Quad despite its limited hard power impact?
 3. How did the 2004 Indian Ocean tsunami contribute to the formation of the Quad?
 4. In what ways did the Biden administration expand the role and agenda of the Quad?
 5. Why is the Quad considered successful as a minilateral but still limited in countering China?
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PREPARATION

'Pakistan's army chief is cosying up to Donald Trump

August 03, 2025

OUTLINE:

1. Background & Recent Developments

- Asim Munir, Pakistan's army chief, gains influence amid renewed U.S.-Pakistan ties.
- He met Trump after a brief India-Pakistan conflict; U.S. imposed tariffs on India and signed a trade deal with Pakistan.

2. Shift in U.S. Foreign Policy

- America re-engaging with Pakistan on trade, security, and Middle East policy.
- Potential U.S. arms sales to Pakistan; reduced criticism of missile program.

3. Domestic Political Landscape

- Munir's popularity rises; civilian government backed by military holds two-thirds majority.
- Speculation grows over Munir's presidential ambitions.

4. Personal Profile of Munir

- Son of an imam, madrasa-educated, first army chief without U.S./UK training.
- Described as pious but pragmatic, interested in economic reform.
- Compared to past strongmen like Ayub Khan and Musharraf.

5. India-Pakistan Tensions

- Munir's speech hinted at hardline stance on Kashmir and India.
- Pakistan denies involvement in Kashmir attack, but rhetoric fuels tension.
- Pakistan warns of deeper strikes in event of future conflict.

6. U.S.-Pakistan Strategic Outlook

- U.S. sees Pakistan as useful in managing Iran and Muslim world diplomacy.
- Risk of upsetting China as Pakistan strengthens U.S. ties.
- Economic cooperation remains uncertain due to Pakistan's unstable climate.

7. Conclusion

- Munir's grip on power is strong, but future uncertain.
- Risks of regional conflict between nuclear powers are rising.



Field marshal Asim Munir, Pakistan's army chief, could hardly have wished for more. For almost two years, he had been under fire at home over his meddling in politics. Wracked by debt and insurgent violence, his country had been sidelined in geopolitics as America and other rich countries courted India, Pakistan's arch-rival. And yet there he was, enjoying a private lunch with Donald Trump in the White House on June 18th, just over a month after Pakistan's brief conflict with India. Then, at the end of July, came further snubs for India: branding it a "dead economy", Mr Trump imposed tariffs of 25% while hailing a new trade deal with Pakistan.

The field marshal's fortunes reflect a shift in American policy that affects India, China and the Middle East. America's close ties to Pakistan deteriorated after American forces killed Osama bin Laden in his Pakistani

hideout in 2011. America then lost interest after leaving Afghanistan a decade later. But to India's dismay, America and Pakistan are now rebuilding ties with a focus on trade, counter-terrorism and consultation on Middle Eastern policy. America may even sell arms again to Pakistan (it currently gets around four-fifths of them from China). Pakistan's politics may be at a turning-point, too. There is still broad public support for Imran Khan, the jailed former prime minister (and one-time cricketer) who was barred from parliamentary polls in 2024. Even so, Field Marshal Munir's popularity has surged since the conflict with India. And the military-backed civilian government now has the two-thirds parliamentary majority needed to alter the constitution (after a controversial re-allocation of seats). That has ignited rumours that the army chief could become president too, opening a fourth period of military rule since independence in 1947.

The future of the world's second-largest Muslim country and its relations with America, India and China thus depends increasingly on one question: what exactly does Field Marshal Munir want? The man himself declined an interview request (as he has done for all media since his appointment in 2022). But Lieutenant General Ahmed Sharif Chaudhry, Pakistan's military spokesman, tells *The Economist* that talk of his boss becoming president is "nonsense". He also challenges the idea that the field marshal is more ideological than recent predecessors.

Unlike most of them, the field marshal is the son of an imam. He was educated in a madrasa and can recite the Koran by heart. He is also the first Pakistani army chief not to have trained in America or Britain. Yet General Chaudhry argues that the army chief is “well versed” with the West and resolutely opposed to Jihadist groups operating on Pakistani soil (one of which India blames for the terrorist attack that triggered the recent conflict). Among his troops, the army chief often voices distaste for mullahs who have “made religion a business,” General Chaudhry says. On India, however, the military spokesman says the field marshal’s personal views were reflected in a speech on April 16th, six days before the attack in the Indian-controlled part of Kashmir. Some suggest the field marshal was improvising when he invoked the idea that Hindus and Muslims could not co-exist in one nation, and described Kashmir as India’s “jugular vein”. Pakistan denies involvement in the Kashmir attack. But in that speech, the military spokesman suggests his boss was articulating “what he stands for, what he is ready to die for”, partly as a response to the rise of Hindu nationalism in India.

Others who have regularly met the army chief describe him as both pious and pragmatic, with a keen interest in the economy. Though he prays five times daily, says one, he does not “apply spirituality to statecraft”. He admires the modernisation drive of Saudi Arabia’s Crown Prince Muhammad bin Salman. Like mbs, he can be vindictive and has a temper, especially when talking about Mr Khan, who (as prime minister) sacked him as intelligence chief. And

his appetite for risk is greater than that of his predecessor, who favoured quiet (and ultimately fruitless) diplomacy with India. Even some critics credit the field marshal with resisting foreign pressure not to respond to India’s initial air strikes.

But his ultimate political ambitions are uncertain. Some predict he could grab the presidency soon to capitalise on his domestic popularity and Mr Trump’s fondness for strongmen. That would institutionalise his authority (foreign and business leaders already try to deal with him directly on many matters). It would also offset the risk that a less pliant civilian leadership might replace him as army chief when his current term expires in 2027. Critics cite his promotion to field marshal in May, comparing him to Ayub Khan, Pakistan’s first dictator and only other officer of that rank. Pakistan is not under martial law but “Asim law”, Mr Khan, the ex-prime minister, said in a statement from prison on July 24th. The counter-argument is that the current “hybrid” leadership works in the field marshal’s favour. Aged just 57, he is the most powerful army chief since Pervez Musharraf, who seized power in a coup in 1999. He has a co-operative and able prime minister and, if the current political compact endures, he can remain as army chief indefinitely (there is no term limit or mandatory retirement age). He and civilian leaders also share an interest in suppressing Mr Khan’s supporters (dozens of whom have recently been jailed, including 108 on July 31st alone) before parliamentary polls due by 2029. A more

overt power grab might fuel support for Mr Khan, including in the armed forces.

Either way, the field marshal would probably still enjoy America's backing. He recently earned its praise for killing and capturing leaders of a local offshoot of Islamic State. He has sparked interest from Trump associates in Pakistan's crypto and mining sectors. And he has positioned Pakistan as a potential means to advance America's interests with Iran and its efforts to get more Muslim countries to establish diplomatic ties with Israel.

In return, America has toned down criticism of Pakistan's programme to build longer-range ballistic missiles, which officials from Joe Biden's administration considered a threat to America. It has resumed some aid programmes. It is also considering selling weaponry, including armoured vehicles and night-vision goggles, to help Pakistan combat local insurgents. And American officials are examining Pakistan's evidence to support its claims that India backs those insurgencies, although they are unconvinced so far.

The Field Marshal's aim is to build a more sustainable, multi-faceted relationship with America. There is potential for progress. It is, however, a high-wire act. The prospects for economic co-operation are uncertain given Pakistan's poor investment climate. Mutual distrust hampers efforts to combat terrorism. And while Pakistani officials suggest that closer ties with America will not come at China's cost, the Chinese leadership may disagree. Then there is India.

Field Marshal Munir wants to bring it to the negotiating table. Narendra Modi, India's prime minister, is determined to resist and has vowed to respond to any more terrorist attacks with further military action. Asked how Pakistan would react to that, its military spokesman says it would begin by striking deeper within India. "We'll start from the east," he says. "They also need to understand that they can be hit everywhere." The field marshal's grip on power may have increased since May. But so too have the risks of a bigger clash between South Asia's nuclear strongmen ■

VOCABULARY IN CONTEXT

DIFFICULT WORDS:

1. **Meddling** – Interfering in matters that are not one's concern, often unwelcome or inappropriate.
2. **Insurgent** – A person or group rebelling against an established authority or government.
3. **Reallocation** – The act of distributing or assigning resources or responsibilities again in a different way.
4. **Ideological** – Based on or relating to a system of ideas and beliefs, especially political or religious ones.
5. **Vindictive** – Having or showing a strong desire for revenge.
6. **Institutionalise** – To establish something as a norm or permanent part of a system or organization.
7. **Hybrid** – A combination of different elements, often referring to a mixed political or governance system.
8. **High-wire act** – A risky or delicate situation requiring skill and balance to manage successfully.

PHRASES:

1. **Come at (a cost)** – To result in consequences or drawbacks.
2. **Step down** – To resign or leave an official position.
3. **Crack down (on)** – To take strong action against something undesirable or illegal.
4. **Play out** – To unfold or happen over time, often in a dramatic or uncertain way.
5. **Back down** – To withdraw from a position or demand under pressure.
6. **Build up** – To gradually develop or increase in strength, amount, or importance.
7. **Strike back** – To retaliate or respond with force after being attacked.
8. **Take over** – To gain control or assume responsibility, often replacing someone else.

IDIOMATIC EXPRESSIONS:

1. **Under fire** – Being criticized or attacked, especially publicly.

DECONSTRUCTION OF ARTICLE

JARGON/TERMINOLOGIES:

Term / Jargon	Meaning
Field Marshal	The highest military rank in Pakistan, above General; a ceremonial or rare rank, often signaling extraordinary authority or symbolic importance.
Tariffs	Taxes imposed by a government on imported goods; used here to describe a 25% duty placed by Trump on Indian products.
Counter-terrorism	Activities and strategies used to prevent, respond to, and eliminate terrorism.
Constitutional majority	A supermajority (typically two-thirds) required in parliament to amend the constitution legally.
Hybrid leadership	A political system where military and civilian powers are intertwined, with the military wielding

	substantial behind-the-scenes influence.
Ballistic missiles	Long-range, guided missiles capable of delivering nuclear or conventional warheads.
Insurgents / Insurgency	Armed rebellion or resistance against a recognized authority or government, often involving guerrilla tactics.
Martial law	Direct military control of civilian functions of government, typically during emergencies or coups; not formally in place but referenced as "Asim law."

BROADER THEMES & APPLICATIONS:

- 1. Military Influence in Politics:** Demonstrates how military leaders can dominate civilian governance in fragile democracies.
- 2. Geopolitical Realignment:** Reflects shifting alliances where traditional partners (like the US) reassess ties based on strategic interests.

3. **Rise of Strongman Leadership:** Highlights global trends of power consolidation by assertive, risk-taking leaders with populist or authoritarian styles.
 4. **Terrorism and Counterterrorism:** Shows the persistent challenge of militant violence shaping foreign and domestic security policies.
 5. **US-China-India-Pakistan Dynamics:** Illustrates the complex balancing act regional powers play in navigating superpower rivalries.
-

KEY QUESTIONS:

1. What are Field Marshal Asim Munir's long-term political ambitions, and could he become Pakistan's next president?
 2. How is the recent shift in American foreign policy influencing the balance of power in South Asia, particularly between India and Pakistan?
 3. To what extent is Field Marshal Munir's rise a reflection of Pakistan's "hybrid" civil-military governance model?
 4. Can Pakistan realistically balance closer ties with both the United States and China without alienating either?
 5. How might renewed conflict between India and Pakistan escalate, given both nations' nuclear capabilities and rising nationalist rhetoric?
-

The The 'Age of Economic Warfare' Comes for the Energy Transition

Kevin Brunelli

August 4, 2025

OUTLINE:

1. Introduction

- Recent attention on China's rare earth and magnet restrictions.
- July 2025 restrictions mark a strategic shift to advanced battery tech.
- Signal a new phase in global economic competition: *economic warfare in clean energy*.

2. II. Key Technologies Targeted

- **Cathode Active Materials:**
 - Export licenses now required for next-gen LFP and LMFP technologies.
 - China dominates LFP production (~99% global share).
 - Next-gen LFP competes with NMC on energy density and cost.
- **Direct Lithium Extraction (DLE):**
 - Faster, water-efficient method vs. traditional brine.
 - China restricts key adsorption-membrane tech.
 - U.S. firms reliant on Chinese DLE providers (e.g., Sunresin).

3. III. Strategic Implications

- China's controls reinforce its battery supply chain dominance.

- Export restrictions shift from raw materials to *advanced technologies*.
- Intention: slow foreign competitors, protect Chinese innovation, and expand global EV reach.

4. Economic Warfare Context

- Follows framework from Edward Fishman's "*Chokepoints*."
- U.S. uses export controls for security (e.g., semiconductors); China uses them for industrial advantage.
- Mirrors U.S. 2022 semiconductor controls, but focused on clean energy.

5. U.S. Response and Challenges

- U.S. has mimicked China in defense-related materials (e.g., rare earths via MP Materials).
- In battery tech (LFP), U.S. lacks:
 - Domestic cathode expertise and supply.
 - Cost-competitive production.
- Policy direction under Trump administration is *undermining* domestic competitiveness:
 - EV tax credits rolled back.
 - Fuel standards weakened.
 - IRA benefits undercut.

6. Conclusion

- China is leveraging its battery tech leadership as a chokepoint in global energy transition.



China's export restrictions on heavy rare earths and permanent magnets have garnered the majority of the public's attention, but a new set of restrictions on battery supply chain technology signal a turning point. The April restrictions on rare earths were a continuation of China's past approach, focusing on dual-use applications and minerals with small markets. But Beijing's decision in July to implement export licensing requirements on lithium-ion cathode active materials and lithium extraction technologies marks the start of a new era. The age of economic warfare has now come for the energy transition. In a move initially proposed in early January, China's Ministry of Commerce, in coordination with the Ministry of Science and Technology, formally added a series of advanced critical minerals and battery supply chain technologies to the "Catalogue of Technologies Prohibited and Restricted from Export from China." The most impactful are export-licensing requirements on technologies necessary to produce next

generation lithium-iron phosphate (LFP) and lithium manganese iron phosphate (LMFP) cathode active materials along with technologies for direct lithium extraction. Cathode active materials are a core component of a lithium-ion battery that determines its energy density, performance, and cost.

China dominates the global lithium-ion battery supply chain, with particularly overwhelming control over LFP technologies. Chinese companies produce nearly 99 percent of the world's LFP cathode materials and lead in LFP cell manufacturing, driven by strong domestic demand for affordable electric vehicles. LFP, instead of nickel-manganese-cobalt (NMC), is now the chemistry of choice in the world's largest EV market. In the context of these restrictions, Chinese companies are also the only companies that have started to produce next-generation LFP cathode active material. Next-generation LFP material significantly increases the energy density of LFP batteries. The higher density allows vehicles to compete with NMC batteries, which have higher energy density, on driving range, without the added cost of additional raw materials like nickel and cobalt. The result is a "best of both worlds" solution: lower-cost EVs with superior performance. China's export restrictions on next-generation battery technologies allow Beijing to dictate the global market as these innovations are commercialized. By limiting access to the best LFP technology, Beijing can slow the development of foreign competitors while forcing them to rely on Chinese imports – effectively reinforcing its dominance in the battery supply chain. These controls not only protect and promote domestic manufacturing, but also advance China's broader strategy of exporting battery technologies and EVs worldwide, as Chinese brands expand their global footprint.

China has also restricted technologies key to direct lithium extraction (DLE). Unlike traditional brine-based methods – which rely on large evaporation ponds and take 18-24 months to yield lithium – DLE technologies can extract lithium in a matter of hours or days. This makes it possible to produce lithium from brine sources that were previously uneconomical or geologically unsuitable. By enabling faster production timelines, reducing water usage, and expanding the geographic footprint of viable lithium projects, DLE could diversify global supply if it is fully commercialized.

The new restrictions target adsorption-membrane related technologies that are necessary for the development of DLE. Chinese producers, like Sunresin, are the leading providers. As Reuters reported in February, several U.S. companies looking to expand into DLE currently rely on Sunresin's technologies. U.S. companies could eventually produce their own material, but it would severely slow their extraction development and allow Chinese companies to become the global leaders in a still emerging industry. The United States can support companies like Lilac Solutions and Albemarle that are building non-Chinese technologies to respond to these restrictions. Previously, China's export restrictions focused predominantly on materials and technologies with dual-use applications: gallium, germanium, graphite, and most recently heavy rare earths elements and advanced permanent magnets. Graphite and rare earths are necessary for batteries, wind turbines, and electric vehicles but the restrictions were implemented because of their dual use applications. The new restrictions are focused solely on technologies vital to the energy transition. China created key

chokepoints in clean energy supply chains, and now Beijing is taking advantage of them. China is exerting its control to slow the development of competitors, support domestic producers, and dictate the next generation of the clean energy economy.

It was inevitable that the "age of economic warfare," as coined by Edward Fishman in "Chokepoints: American Power in the Age of Economic Warfare," would eventually find its way into the energy transition. It has already proliferated through all aspects of our economy. The age of economic warfare is marked by the use of tools like sanctions, financial restrictions, export controls, and the weaponization of key chokepoints to exert economic power. As Fishman describes in "Chokepoints," the modern age of economic warfare has reshaped the global financial system, oil market, and semiconductor industry. It was only a matter of time before the energy transition became entangled.

The shift from export restrictions on raw or processed materials to advanced technologies mirrors Beijing's broader strategy in the battery supply chain over the last two decades. China began its ascent in the supply chain in the upstream with overseas investments in lithium, cobalt, nickel, and other critical mineral mining projects. Then it moved downstream, leveraging those resources to focus on advanced technologies and build a comprehensive battery supply chain and electric vehicle sector. As global competition over clean energy supply chains intensifies, China is demonstrating that the battle is not just about resources – it's about who controls the tools of the transition. And Beijing decided to follow the Washington playbook to make their mark. In September 2022, weeks prior to announcing the United States' strongest export restrictions

to date on advanced semiconductors, Jake Sullivan, the national security adviser for previous U.S President Joe Biden, stated “on export controls, we have to revisit the longstanding premise of maintaining ‘relative’ advantages over competitors in certain key technologies...we must maintain as large of a lead as possible.” The new export restrictions on LFP and DLE allow China to maintain “as large of a lead as possible” in the battery supply chain. Whereas the United States has used export controls to slow down China’s military-adjacent technology sectors, Beijing has adopted a similar playbook, but repurposed it to serve industrial, not security, priorities. China is looking to slow down foreign commercial competitors and support domestic manufacturing rather than denying adversaries military capabilities.

China is following the United States’ playbook, but it remains to be seen if the Trump administration will follow China’s playbook when it comes to responding to technology restrictions. Beijing poured funding into a domestic semiconductor supply chain when the U.S. implemented restrictions on advanced semiconductors. They decided they were going to have to build their own industry if they could not rely on access to leading Western technology.

The Trump administration did follow a similar playbook in response to restrictions on rare earth elements and permanent magnets through the Department of Defense’s investment into MP Materials. The creative funding mechanism aims to build a domestic mine to magnet supply chain. Like Beijing before it, Washington finally realized that it could not allow a competitor to control key chokepoints on technologies necessary for the

defense sector. Additionally, rare earths could continue to be a major bargaining chip in any trade negotiations. But it is highly unlikely the U.S. will follow the same playbook when it comes to LFP technologies. There has been a series of recent announcements of new domestic LFP production from LG, SK ON, and Samsung. However, these efforts are constrained by the absence of domestic cathode production, limited technical expertise in advanced LFP materials, and higher production costs. To compete with China, the United States would have had to double down on the energy transition to build domestic demand and strengthen the Inflation Reduction Act benefits.

Instead, the administration’s antipathy toward policies that support clean energy technologies is effectively ceding the battery supply chain to China, and with it, potentially the future of the auto industry too. The elimination of EV tax credits, weakening of fuel efficiency standards, and the scaling back of manufacturing support will make it extremely difficult for U.S. companies to compete with Chinese companies in next generation battery technology.

VOCABULARY IN CONTEXT

Difficult Words

1. **Licensing** – Granting legal permission to do something, such as export restricted technology.
2. **Phosphate** – A chemical compound containing phosphorus, used in battery materials like LFP.
3. **Extraction** – The process of removing or obtaining something, often a substance from another material.
4. **Density** – The amount of energy stored per unit of volume or mass in a battery.
5. **Commercialized** – Brought to market or made available for widespread use and sale.
6. **Dual-use** – Technologies that can be used for both civilian and military purposes.
7. **Chokepoints** – Strategic areas or resources whose control gives significant power or advantage.
4. **Add to** – To include something extra in a group or list.
5. **Rely on** – To depend on someone or something for support or help.
6. **Slow down** – To reduce the speed or progress of something.
7. **Build up** – To gradually develop or increase something over time.
8. **Lay out** – To explain or present information clearly and systematically.

Idiomatic Expressions

No idiom

Phrases

1. **Focus on** – To concentrate attention or effort on something specific.
2. **Carry out** – To perform or execute a task, plan, or action.
3. **Mark the start of** – To indicate the beginning of an event or change.

DECONSTRUCTION OF ARTICLE

JARGON/TERMINOLOGIES:

Term / Jargon	Meaning
Export Restrictions	Government-imposed limits or controls on the sale or shipment of specific goods or technologies to foreign countries.
Rare Earths	A group of 17 metallic elements used in high-tech applications like magnets, batteries, and electronics.
Dual-use Applications	Technologies or materials that can be used for both civilian and military purposes.
Cathode Active Materials	Key battery materials that determine a lithium-ion battery's energy density, performance, and cost.
Lithium-Ion Battery	A type of rechargeable battery widely used in electric vehicles and portable electronics.
LFP (Lithium-Iron Phosphate)	A type of cathode material used in lithium-ion batteries known for safety, low cost, and long cycle life.

DLE (Direct Lithium Extraction)	An advanced method to extract lithium quickly from brine, offering faster production with lower environmental impact than traditional methods.
Energy Density	The amount of energy a battery can store relative to its weight or volume, affecting driving range and performance.

BROADER THEMES & APPLICATIONS:

1. **Economic Warfare:** Nations are using trade restrictions and technology controls as tools of geopolitical influence.
2. **Technological Sovereignty:** Control over critical technologies is key to maintaining national economic and industrial power.
3. **Energy Transition:** Battery technologies are central to the shift toward renewable energy and electric mobility.

4. **Supply Chain Dominance:** China's grip on battery supply chains gives it leverage in global clean tech development.
 5. **Policy as Strategy:** Export controls and industrial policy shape global competition in emerging industries.
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KEY QUESTIONS:

1. What prompted China to implement new export restrictions on battery supply chain technologies in July?
 2. How do the recent export controls differ from China's previous restrictions on rare earth elements?
 3. Why are cathode active materials critical to lithium-ion battery performance and cost?
 4. What is the significance of next-generation LFP and LMFP technologies in the global EV market?
 5. How does China's control over battery technology relate to the concept of economic warfare?
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PREPARATION

The United States Is Losing India

Sana Hashmi

JULY 30, 2025

OUTLINE:

1. Backdrop of India-U.S. Relations

- Trump's strong popularity in India during first term (e.g., "Howdy Modi" rally).
- Initial optimism following Trump's 2024 re-election.

2. Rising Indian Concerns

- U.S. engagement with Pakistan (e.g., Rubio's meeting with Ishaq Dar).
- Trump's revived talk of mediating on Kashmir seen as a violation of Indian sovereignty.

3. India's Strategic Expectations

- India wants consistent respect for its core concerns (e.g., terrorism, Kashmir).
- Not seeking unconditional support but principled alignment.

4. Changing Indian Foreign Policy

- Shift from nonalignment to pragmatic partnerships (Quad, Malabar exercises).
- India is contributing to Indo-Pacific security and expects reciprocal commitment.

5. Consequences of U.S. Inconsistency

- Pakistan's instability and China alignment vs. India's strategic value.

- U.S. mixed signals risk damaging trust and regional partnerships.

6. Strategic Stakes in the Indo-Pacific

- India's balancing role against China remains vital.
- U.S. inconsistency gives strategic space to Beijing.

7. Call for Clarity and Commitment

- U.S. must decide its long-term priorities: India as equal partner or transactional ties.
- Ignoring India's concerns risks long-term damage to the partnership and boosts anti-West sentiment in India.



In 2019, U.S. President Donald Trump stood alongside Indian Prime Minister Narendra Modi at the “Howdy Modi” rally in Houston. The atmosphere was electric. Indian Americans cheered, and New Delhi appeared fully invested in the Trump presidency. Trump’s popularity in India eclipsed that of his successor Joe Biden and even Biden’s vice president, Kamala Harris, who is herself of Indian ancestry. Trump’s re-election in 2024 thus seemed like the beginning of a new, stronger chapter in India-U.S. relations.

That chapter is now closing fast. India is beginning to question the value of its strategic alignment with Washington. And the United States is handing it every reason to do so.

On July 25, when U.S. Secretary of State Marco Rubio met Pakistan’s Deputy Prime Minister and Foreign Minister

Ishaq Dar in Washington to discuss trade and critical minerals, New Delhi took notice. This was not the first time a high-level engagement with Pakistan had stirred unease in India. But the timing, messaging, and broader context made this moment impossible to ignore. Why, many in New Delhi asked, would Washington deepen ties with a country that actively undermines India’s security, especially after decades of painstaking work to build India-U.S. relations? Worse still, Trump’s renewed talk of mediating between India and Pakistan, including on the Kashmir dispute, has reopened old wounds. India has long maintained that Kashmir and other sensitive issues must be handled bilaterally. Any interference, no matter how well-intentioned, is seen as a breach of sovereignty.

Trump’s talk of mediation thus sends a clear message to India that its core concerns are negotiable. If Washington is serious about deepening ties with India, such comments are at best a diplomatic misstep and at worst strategic self-sabotage on a grand scale.

Pakistan’s sponsorship of cross-border terrorism is a direct national security threat for India. Any United States administration that ignores this point is guilty of diplomatic negligence. India does not ask for unconditional alignment, only consistency and respect for its core interests from the United States.

This indifference is especially jarring now that India is recalibrating its foreign policy. No longer shielded by nonalignment, India has leaned into pragmatic engagement with the West. New Delhi has joined frameworks like the Quad, committed to expanding

military exercises like Malabar, and demonstrated readiness to share responsibility in the Indo-Pacific. India is doing its part, but partnerships cannot be one-sided.

Trump's mixed signals and public overtures to Pakistan are actively undermining India-U.S. ties, to unclear ends. Pakistan is economically fragile, politically volatile, and increasingly tethered to China. India, by contrast, brings capacity, credibility, and the geopolitical leverage needed to shape Asia's balance of power.

By engaging Pakistan – a state firmly within Beijing's orbit – and wavering on India's core concerns, the United States is weakening trust and undermining the very alliances and partnerships it claims to prioritize. The United States must decide if it wants a steady, forward-looking partner in India or a string of transactional dealings with Pakistan that only breed mistrust.

India is managing a delicate and high-stakes relationship with China, and despite this challenge, it remains committed to regional stability, alongside Australia and Japan. Yet none of these countries can uphold the Indo-Pacific vision alone while Washington continues to send conflicting signals. U.S. inconsistency hands Beijing a strategic advantage. It allows China to appear more predictable and, at times, more reasonable in contrast.

The original rationale for closer India-U.S. ties was straightforward: India is the only democratic power in Asia with the capacity to balance China's growing assertiveness. That rationale still holds true, and the need is more pressing than ever. Beijing is stepping up pressure on Taiwan. The South China Sea remains volatile. The regional

balance is shifting. Washington cannot afford to sideline its trusted partner in Asia, lest it weaken the Indo-Pacific framework from the inside out.

As India and Pakistan traded strikes in early May U.S. Vice President J.D. Vance said of the conflict, "It's none of our business." If the Trump administration still holds this view – that what happens in South Asia is of no concern – then the United States should step aside. If the Trump administration does envision a role for itself in the region, then now is the moment to demonstrate that the United States sees India as more than a convenient partner. The Trump administration must clarify its long-term priorities. India is an indispensable and equal partner, and must be treated as such. Doing otherwise risks damaging a partnership that may never fully recover. Rebuilding trust will take decades; influencing India's increasingly confident strategic autonomy will be even harder.

Ignoring India's concerns not only jeopardizes the bilateral partnership but also strengthens voices within India that argue the West cannot be trusted. As it stands now, the Trump administration is giving those voices every reason to say, "We told you so!" ■

VOCABULARY IN CONTEXT

DIFFICULT WORDS:

1. **Recalibrating** – Adjusting or redefining something, especially a strategy or policy, for better outcomes.
2. **Overtures** – Initiatives or proposals made to begin a relationship or negotiation.
3. **Sovereignty** – A nation's independent authority and control over its own affairs.
4. **Transactional** – Based on short-term exchanges or deals rather than long-term relationships.
5. **Assertiveness** – Confident and forceful behavior or policy, often in international relations.
6. **Volatile** – Unstable and likely to change rapidly, often in a negative or dangerous way.
7. **Strategic autonomy** – The ability of a country to pursue its national interests independently.
8. **Geopolitical leverage** – Influence a country holds in international affairs due to its political or geographic position.

4. **Bring about** – To cause or result in something happening.
5. **Step aside** – To withdraw or move out of a position or responsibility.
6. **Reopen old wounds** – To bring up past conflicts or painful memories again.
7. **Give reason** – To provide justification or cause for something.
8. **Hold true** – To remain valid or accurate over time.

IDIOMATIC EXPRESSIONS:

1. **Reopen old wounds** – To bring up past conflicts or painful memories that cause emotional distress again.

PHRASES:

1. **Stand alongside** – To support or be together with someone.
2. **Take notice** – To become aware of or pay attention to something.
3. **Lean into** – To actively embrace or engage with something.

DECONSTRUCTION OF ARTICLE

JARGON/TERMINOLOGIES:

Jargon / Terminology	Meaning
Strategic alignment	A coordinated partnership where countries align their policies and goals for mutual benefit.
Bilateral	Involving or agreed upon by two parties or countries.
Sovereignty	The authority of a state to govern itself without external interference.
Pragmatic engagement	Practical and realistic involvement in international relations, focusing on results.
Indo-Pacific	A geopolitical region including the Indian Ocean and the Pacific Ocean areas.
Cross-border terrorism	Terrorist activities that cross national boundaries from one country into another.

Geopolitical leverage	Influence or power a country holds in international relations due to its strategic position.
Strategic autonomy	A country's ability to make independent decisions in its foreign and defense policies.

BROADER THEMES & APPLICATIONS:

1. **Strategic Partnerships:** Building and maintaining trust is crucial for strong, long-term international alliances.
2. **Sovereignty and Respect:** Respecting a nation's core concerns and sovereignty is key to successful diplomatic relations.
3. **Geopolitical Balance:** Aligning with regional powers helps counterbalance rising influence from rival countries.
4. **Consistency in Foreign Policy:** Mixed signals from powerful states weaken trust and embolden adversaries in global affairs.

5. **Regional Stability and Security:** Cooperative security efforts are essential for managing high-stakes relationships and conflicts.
-

KEY QUESTIONS:

1. Why is India beginning to question the value of its strategic alignment with the United States?
 2. What concerns did New Delhi raise after U.S. Secretary of State Marco Rubio met with Pakistan's leaders?
 3. How does India view U.S. talk of mediating between India and Pakistan on sensitive issues like Kashmir?
 4. What impact do Trump's mixed signals and engagement with Pakistan have on India-U.S. relations?
 5. Why is consistency important in the U.S. foreign policy toward India, especially regarding China and the Indo-Pacific region?
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CSS – PMS
PREPARATION

National Section

All articles are taken from prestigious Pakistan
and world 's newspapers.

A prayer and national security

Seema Ilahi Baloch

JULY 28, 2025

OUTLINE:

1. Historical Context

- Early 20th-century Punjab: cultural preference for many sons linked to colonial army recruitment.
- Legacy of this mindset continues in modern Pakistan.

2. Demographic Overview

- Current population: 241.5 million with 2.55% annual growth.
- Youth bulge: 26% aged 15–29; 53.8% in working-age group.
- Seen as both a demographic dividend and a challenge.

3. Government Initiatives

- PM's Youth Skill Development Programme (PMYSDP) and NAVTTC training programs.
- Target: nearly 500,000 skilled workers in 3 years.
- Efforts insufficient compared to scale of unemployment.

4. Unemployment and Poverty

- Youth unemployment at 29%; over 22.7 million 'idle youth'.
- Regional disparities: severe in Balochistan, KP, and rural areas.
- Poverty estimates vary: up to 44.7% (World Bank) and 39.5% (PIDE).

- Rural-urban divide in poverty levels.

Health and Development Impact

- 40% of children under five are stunted due to malnutrition.
- Long-term impact on national productivity and economic growth.

5. Poverty-Terrorism Nexus

- Poverty exploited by terrorist groups for recruitment.
- Economic deprivation both fuels and is worsened by terrorism.
- Balochistan and KP particularly affected.

6. National Security Risks

- 'Idle youth' seen as a potential destabilizing force.
- 2022-2026 National Security Policy recognizes population growth as a threat.

7. Need for Population Reform

- Other Muslim-majority countries have succeeded in population control.
- Pakistan lags behind in human development and reform urgency.

8. Call to Action

- Prior reports and policies highlight solutions.
- What's lacking is sustained **political will**.
- Urgency to act before demographic pressures jeopardize national security.



'MAY you have seven sons' was a familiar prayer in Punjab in early 20th-century British India, when the Empire gave stipends to families with many male children. They were potential recruits for the colonial armies. Though the British have long departed, echoes of this sentiment seem to have lingered through the century.

We are today a population of 241.5 million and a promise for more, with a growth rate of 2.55 per cent annually. Promising to some as a demographic dividend waiting to be harnessed, it also presents significant challenges. The youth bulge is striking; 26 per cent of the population is between 15 and 29, and over half (53.8pc) falls within the working-age group (15-59). The Economic Survey, 2025,

interestingly highlights this demographic dynamic as a "unique opportunity".

Also highlighted by the Survey are several initiatives by the government aimed at unlocking this potential. The National Vocational & Technical Training Commission, especially under the Prime Minister's Youth Skill Development Programme, has trained tens of thousands of young people in emerging fields. Under the PMYSDP, a total of 72,362 have been trained especially in IT. Looking ahead, NAVTTC aims to train 100,000 youth in high-tech IT skills, another 100,000 in traditional trades, and 150,000 in industrial skills over the next three years. All these efforts combined aim to elevate our skilled workforce to close to half a million — 473,291, to be exact.

This number falls significantly short of the unemployment challenge. Youth unemployment, according to the 2023 Population and Housing Census, remains alarmingly high at 29pc among those aged 15-24. An additional 16m young people are neither employed nor in education — deemed 'idle youth' — peaking at 22.7m in 2023. Unemployment is especially severe in Balochistan and KP and in the rural areas.

With inadequate jobs in the market, poverty is certain to increase. A recent World Bank report raises serious concerns. Due to an upward revision of the poverty threshold, the poverty rate in Pakistan has jumped from 39.8pc to 44.7pc at a per-day income of \$4.20. According to government estimates, using official data from the 2018-19 Household Income and Expenditure Survey, the

poverty rate is 21.9pc. Recent research from the Pakistan Institute of Development Economics suggests it could be as high as 39.5pc, with 70pc of people in Balochistan, 48pc in KP, 45pc percent in Sindh, and 30pc in Punjab suffering from poverty. Rural areas have higher poverty rates than urban areas.

Regardless of which figures we want to believe in, economic security is at risk.

We seem to know what to do. But what appears to be missing is political will.

Poverty's toll is also visible in health metrics. Approximately 40pc of children under five are stunted — the highest in South Asia. Stunting, caused mainly by malnutrition, is known to stifle cognitive and physical development. Stunted children will become adults with lower levels of intelligence and with decreased capacity to earn, hampering productivity and long-term economic growth at the national level. We are thus creating a vicious cycle of economic deprivation, unemployment and underdevelopment.

The interconnection between economic deprivation and social unrest is complex. Scholars debate whether poverty directly fuels terrorism. Egyptian analyst Dr Hany Ali Nasira reviewed poverty rates of the countries which ranked the first six on the Global Terrorism Index for the years 2020 to 2023 and found a strong correlation between poverty and terrorism. He contends that, although there are other causes giving rise to terrorism — such as crises, political

instability and sectarian disagreements, external support to terrorist groups and governance — terrorist groups often exploit economic grievances. They promise employment or financial gains, turning poverty into a fertile ground for recruitment.

Research from Punjab University also demonstrates that terrorism inflames uncertainty, deterring investments, foreign and domestic, deepening unemployment and poverty, and further fuelling a cycle of violence and underdevelopment. The deadly terrorist attacks in Balochistan and KP exemplify these dynamics, threatening national security. The findings suggest that terrorism both contributes to and is exacerbated by poverty, creating a self-reinforcing cycle that hinders economic development.

With our economic growth rate unable to keep pace with our increasing population, we need to address the challenge our 'idle youth' may pose to national security. The 2022-2026 National Security Policy, too, explicitly recognises population growth as a destabilising factor, particularly when intertwined with poverty, ethnic tensions and uneven development.

Almost all other large Muslim nations — Bangladesh, Iran, Turkey, Malaysia, Indonesia — have successfully implemented population reforms decades ago. It has helped them in maintaining their human development goals. While Pakistan ranks 168 out of 193 countries on the Human Development Index 2025, Bangladesh is at 130, Iran at 75 and Indonesia at 113, to mention a few. Yet, in Pakistan, the debate on population continues. An urgent

sense of crisis remains elusive. Whether we adopt 'family health' or 'tawazzun' — balanced coexistence between population and available resource as guiding principles — we must act decisively.

Four years ago, an editorial in *Dawn* on July 11 (World Population Day) suggested a 'population emergency'. More conferences were held, and more commitments made by government officials, on World Population Day this year. We seem to know what to do, also detailed in the paper published last November by the Population Council and UNFPA, titled Pakistan@2050: Demographic Change, Future Projections, and Development Opportunities.

What seems to be missing is the political will to 'seize the moment' advocated by Dr Zeba Sathar, country director of the Population Council in *Dawn* on the important 'Day' — another day remembered yet neglected.

Let us seize the moment lest the prayer in Punjab trails us into the next century. Let us seize the moment lest our own people become a challenge for our national security ■

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PREPARATION

VOCABULARY IN CONTEXT

DIFFICULT WORDS:

1. **Stipends** – Fixed regular payments made to individuals, often for services or as a benefit.
2. **Vocational** – Relating to skills or training for specific trades or professions.
3. **Stunting** – Impaired growth and development in children due to chronic malnutrition.
4. **Destabilising** – Causing instability or weakening the strength of a system or country.
5. **Tawazzun** – An Urdu term meaning balance, especially between population growth and resources.

8. **Act on** – To take action based on advice, information, or knowledge.

IDIOMATIC EXPRESSIONS:

1. **Seize the moment** – *To take advantage of an opportunity as soon as it arises, without delay.*

PHRASES:

1. **Fall short of** – To fail to reach a desired or expected level.
2. **Look ahead** – To plan or think about the future.
3. **Point out** – To highlight or mention something for attention.
4. **Linger on** – To persist or remain for a long time.
5. **Give rise to** – To cause something to happen or exist.
6. **Seize the moment** – To take full advantage of an opportunity without delay.
7. **Break out of** – To escape from a limiting situation or condition.

DECONSTRUCTION OF ARTICLE

JARGON/TERMINOLOGIES:

Term / Jargon	Meaning
Demographic dividend	Economic growth potential resulting from a large working-age population.
Youth bulge	A situation where a large portion of the population consists of young people.
NAVTTTC (National Vocational & Technical Training Commission)	Government body responsible for skill development and technical training in Pakistan.
PMYSDP (Prime Minister's Youth Skill Development Programme)	A federal program to train youth in various technical and IT skills.
Idle youth	Young people who are neither in education, employment, nor training (NEET).
Stunting	Impaired growth and development in children due to poor nutrition, repeated

	infection, or lack of stimulation.
Vicious cycle	A negative and self-reinforcing loop where one problem worsens another.
Population emergency	A critical situation where uncontrolled population growth threatens national stability.

BROADER THEMES & APPLICATIONS:

- 1. Population Growth:** Requires urgent reform to ensure sustainability and avoid socio-economic strain.
- 2. Youth Unemployment:** Needs large-scale job creation and skill training to harness demographic potential.
- 3. Poverty and Inequality:** Must be addressed through inclusive development and targeted social protection.
- 4. Link Between Poverty and Terrorism:** Tackling poverty can reduce extremist recruitment and strengthen national security.
- 5. Lack of Political Will:** Effective policies exist, but strong governance is essential for implementation.

KEY QUESTIONS:

1. How can Pakistan effectively convert its youth bulge into a demographic dividend rather than a demographic burden?
2. What structural barriers are preventing the full implementation of skill development and employment programs?
3. To what extent does the lack of political will contribute to the persistence of poverty and underdevelopment?
4. How does population growth directly impact national security in the context of rising unemployment and terrorism?
5. Why has Pakistan lagged behind other Muslim-majority countries in implementing population control and human development reforms?

ICEP
CSS – PMS
PREPARATION

Return of hard power

Maleeha Lodhi

JULY 28, 2025

OUTLINE:

Resurgence of Hard Power

- Military force remains central in geopolitics.
- Hope for diplomacy over force has faded.
- Examples: Israel, Russia, US, India using force as first resort.

Erosion of International Norms

- Violations of international law have become routine.
- Rise of “gunboat diplomacy” and global lawlessness.

Global Militarization and Economic Coercion

- Defence spending is rising globally.
- Trump's tariffs exemplify use of economic hard power.

Relevance and Resilience of Soft Power

- Despite dominance of hard power, soft power remains vital.
- China's success in soft power strategies (BRI, diplomacy, culture).

Nye and Keohane's Argument for Soft Power

- Coercion alienates allies; attraction builds long-term influence.
- Soft power is essential in an interdependent world.



HARD power has returned with a vengeance to centre stage in geopolitics. Not that its importance ever diminished. That will not happen. Military force will remain a key power resource in international affairs. But there was hope that wars would be abjured as a means to settle inter-state differences and the use of force would be an option of last resort.

Dialogue and diplomacy, rather than military or economic coercion, would become the preferred policy choice for

states. And soft power — the power of persuasion — would be utilised much more to pursue foreign policy goals and build a country's global influence.

Not so today. Powerful countries and regional powers are using hard power to try to bend other states to their will. The threat or the use of force has become an option of first and not last resort for them, and the main way of 'resolving' disagreements and imposing their will. Israel's war on Gaza, its attacks on Iran, Syria, Lebanon and Yemen, the Russian invasion of Ukraine, US bombardment of Iran and India's military action against Pakistan all testify to the increasing use of force.

All these actions have defied international law and the legal prohibition on the use of force. They have been carried out with impunity, further fragmenting an already fraying global order and undermining multilateralism and systems of international cooperation. Global norms that de-emphasise the coercive use of hard power have been wilfully ignored by them in pursuit of their goals. This modern version of 'gunboat diplomacy' has seen the greater use or the threat of force to secure political and economic objectives. This is pushing the world towards a Hobbesian state of lawlessness.

The rising salience of hard power in international affairs is reflected in how countries, especially big powers, have been augmenting their hard power resources. The spike in global defence spending is evidence of this. It has reached a new high as countries big and small deem increasing

their hard power assets to be essential to promoting their goals and secure themselves in an unstable international environment.

With use of military force and economic coercion dominating geopolitics does soft power still count?

The way economic coercion is being used by the Trump administration also testifies to the current surge in the exercise of hard power. President Donald Trump has imposed a trade war by slapping higher tariffs on almost every country in the world to extract concessions in negotiations conducted under the pressure of threats and punitive actions. The use of coercive economic power to browbeat countries has involved no distinction between allies and adversaries. All are being compelled to renegotiate trade deals, with tariffs used as a punitive hard power tool for economic gain. The signal sent by this approach is that noncompliance with US demands will entail a heavy cost. The consequence of this form of hyper-unilateralism is to upend not just the global trade order but also established norms of engagement between countries, with unknowns outpacing the knowns.

Does all this mean soft power has become less important or relevant? Is diplomacy devalued by the increased use of hard power? Is the practice of co-opting others rather than coercing them being discarded? Has the concept of soft power become dated, as some analysts claim? The short answer is no, as it remains an important component of international politics — a key tool in the arsenal of countries to build influence and shape perceptions.

Therefore, despite the prevailing dominance of hard power, it would be a mistake to conclude that soft power, which is the ability to shape the preferences of others and achieve outcomes through 'attraction', no longer counts on the global stage.

In fact, while the US and other states are exercising hard power, China has increasingly been pursuing a soft power strategy, to complement the increase in its economic and military strength. This has helped it expand its global influence, build trust and secure greater cooperation from countries. Not surprisingly, it has shot to number two position among 193 countries in the latest global soft power index compiled by Brand Finance, the London-based consultancy firm. This is the result of its multifaceted economic, diplomatic and cultural strategy to boost its global image.

China's Belt and Road Initiative (with 150 participating countries), technological advances especially in AI, development assistance, investments in green technology and cultural diplomacy are all aspects of its vigorous and diverse soft power efforts. So is its active role in multilateral institutions as well as speaking for the Global South. Its proactive diplomacy, for example, in mediating the rapprochement between Saudi Arabia and Iran, has also enhanced its soft power appeal. All this has enabled China to increase its global influence and shape international perceptions to its advantage.

Joseph Nye, who introduced the notion of soft power decades ago, considered the question of whether soft

power was still significant in today's world. An insightful piece in the current issue of Foreign Affairs co-authored with Robert Keohane, written just before Nye passed away, argued that Trump, "inordinately committed to coercion", did not understand soft power or its role in foreign policy, and relied only on deploying hard power. This was a losing strategy in the long run. This is because if a country is attractive "it won't need to rely as much on incentives and penalties to shape the behaviour of others".

Moreover "If allies see it as benign and trustworthy, they are more persuadable and likely to follow that country's lead". But if they see their trading partner as a bully, they are more likely to be reluctant partners and seek to reduce their long-term dependence. The authors also posit that in a world characterised by growing interdependence, securing cooperation is essential which soft power strategies are very effective at doing.

While the exercise of hard power seems to be the dominant global trend today, soft power continues to have its own place and value in international politics. This means that countries can advance their interests not just through military and economic strength but also by persuasion and attraction which encourages other states to cooperate and align with them. Soft assets cannot replace hard resources but can help states earn respect and trust, so essential for the successful promotion of national goals ■

VOCABULARY IN CONTEXT

DIFFICULT WORDS:

1. **Abjured** – Formally rejected or renounced (especially a belief or action).
2. **Impunity** – Freedom from punishment or negative consequences.
3. **Salience** – The quality of being particularly noticeable or important.
4. **Hyper-unilateralism** – Extreme policy approach where a country acts alone without regard for others.
5. **Rapprochement** – The re-establishment of friendly relations between countries.

7. **Brush aside** – To dismiss or ignore something casually or forcefully.

8. **Play out** – To unfold or happen over time, often referring to events or scenarios.

IDIOMATIC EXPRESSIONS:

1. **Bend someone to one's will** – To force someone to do what you want, often using power or pressure.

PHRASES:

1. **Step up** – To increase or intensify efforts or actions.
2. **Carry out** – To perform or execute a task, plan, or action.
3. **Bend to** – To force someone to accept your will or demands.
4. **Break down** – To collapse or fail, especially in communication or systems.
5. **Shape up** – To develop or progress in a particular way.
6. **Look to** – To rely on or expect something/someone for help or guidance.

DECONSTRUCTION OF ARTICLE

JARGON/TERMINOLOGIES:

Term / Jargon	Meaning
Hard Power	The use of military and economic force to influence the behavior of other states.
Soft Power	The ability to influence others through attraction and persuasion rather than coercion.
Gunboat Diplomacy	The use or threat of military force to achieve diplomatic or political objectives.
Multilateralism	A system where multiple countries work together on global issues through international institutions.
Coercion	The act of compelling a state or actor to act in a certain way through threats or force.
Hyper-unilateralism	A foreign policy approach where a country acts solely in its own interest without considering allies or global consensus.

Belt and Road Initiative

A global infrastructure and development strategy by China to enhance regional connectivity and influence.

Global South

A term used to describe developing countries, often in Africa, Latin America, and Asia, emphasizing shared economic and political challenges.

BROADER THEMES & APPLICATIONS:

1. **Return of Hard Power:** Nations increasingly use military and economic force to assert dominance and resolve conflicts.
2. **Enduring Relevance of Soft Power:** Persuasion and attraction remain vital tools to gain influence and foster international cooperation.
3. **Erosion of International Norms:** Repeated violations of global laws weaken multilateral institutions and destabilize global order.
4. **Power Politics in a Multipolar World:** Major powers are competing for influence using varied approaches, blending coercion with diplomacy.

5. **Strategic Use of Economic Tools:** Tariffs and trade sanctions are being weaponized to extract political and economic concessions.
-

KEY QUESTIONS:

1. How has the resurgence of hard power reshaped the dynamics of global diplomacy and conflict resolution?
 2. To what extent has the violation of international law by powerful states weakened the legitimacy of multilateral institutions?
 3. Can soft power strategies effectively counterbalance the coercive tactics of hard power in today's geopolitical climate?
 4. How does China's integration of soft power complement its broader foreign policy and enhance its global influence?
 5. In an increasingly interconnected world, is reliance on hard power a sustainable approach for long-term global leadership?
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CSS – PMS
PREPARATION

Trump's belligerence drives a major shift in Indo-Pacific

Azhar Azam

JULY 28, 2025

OUTLINE:

1. Shift in Global Alliances:

- Trump's aggressive foreign policy forces US allies, including Australia, to diversify partnerships.

2. Australia-China Rapprochement:

- Albanese's China visit signals intent to stabilise ties; acknowledges China's economic and regional importance.

3. Economic Interdependence:

- China is Australia's top trading partner; bilateral trade reached AUD 312 billion in 2024; mutual economic benefits contrast with US trade imbalances.

4. Trade & Investment Benefits:

- Chinese investments boost Australia's infrastructure, jobs, and exports; businesses optimistic about future ties.

5. US Pressure and Defence Dilemma:

- US pushes for higher defence spending and stronger AUKUS commitments; internal conflict in Canberra on China policy.

6. Public Sentiment & Strategic Choice:

- Australians view China as more reliable than the US; urge for balanced, interest-based diplomacy rooted in 1972 principles.



Donald Trump's implacable belligerence has tutored traditional American allies to quickly adjust to new geopolitical realities or truckle to his ceaseless demands. An increased sense of urgency across Europe and the Indo-Pacific implies that they have decided to take up the gauntlet of diversifying their partnerships.

In a rare show of displeasure at the US president's stubborn arrogance, Australian Prime Minister Anthony Albanese during his China visit sought to stabilise relations and manage differences to "contribute" to regional peace and prosperity, holding a "constructive" meeting with

Chinese President Xi Jinping to underscore Beijing's importance for "our economy, our security and the stability of our region".

Beijing is Canberra's largest trading partner with almost a third of Australia's exports destined for China and bilateral trade hitting 312 billion Australian dollars in 2024. The two economies are highly complementary, meaning China has a huge demand for Australian goods and services. This symbiotic bond, unlike the Australia-US parasitistic trade ties, provides a sound footing to tap the opportunity and strengthen the extensive relationship.

China's investments contribute to infrastructure development, productivity and job creation in Australia; and its development, opening-up and rising middle class unleash new vistas for Australian exporters. As members of Asia-Pacific Economic Forum and Regional Comprehensive Economic Partnership, both countries also have shared interests in safeguarding regional stability and prosperity.

In the face of rising protectionism and unprecedented volatility in global trade due to Trump's unilateral tariffs, a stable and strengthened Australia-China relationship would ensure the Australian economy to withstand and navigate strenuous trials and continue to make a positive impact on domestic workers, employers and industries.

The strengthening of the Beijing-Canberra ties has ushered in a wave of optimism among Australian businesses with 75% of foreign firms in a poll by the Australia-China Chamber of Commerce reporting profitability in 2024. Their enthusiasm — because 70% rate China as one of their top three destinations for investment over the next three years — reinforces Beijing's appeal as a hub of innovation and industrial transformation.

Canberra's intent to "do more business with China" was reflected in its Trade Minister Don Farrell's interview in which he refused to budge to US pressure, emphasising that Chinese trade was nearly 10 times more valuable to Canberra. "We'll make decisions... to engage with China

based on our national interests and not on what the Americans may or may not want."

Nonetheless, disparity between Albanese's and the country's defence department's approaches risks derailing Australia's newfound charm offensive against China. For instance, Canberra has been accusing Beijing of spearheading the largest and most ambitious military buildup since the Second World War. Its Defense Minister, Richard Marles, recently echoed such an assertion.

Yet this assessment has long been contested by none other than Australia's own analysts and former diplomats who believe the Chinese strategy is essentially inward looking, focusing internal stability and external security. Even leading Western investigations reveal that the US, by far, outspends China in defence spending and that Beijing's military development and the record of use of force are relatively restrained.

Conversely, Trump's return is spurring new challenges for the Albanese government. After the Biden administration wanted to get Canberra "off the fence" by locking it for the next 40 years through AUKUS, Trump's AUKUS-skeptic undersecretary of defense Elbridge Colby is leveraging the trilateral partnership to hard-press Australia into making pre-commitments if a US-China war breaks out on Taiwan.

The Trump administration is also pressurising Australia to increase defence spending to 3.5% of the GDP. Canberra has hitherto resisted the US pressure for it would cost Australia tens of billions of dollars. For an economy that will remain in a structural deficit through 2034-35, a defence splurge would indeed imperil Albanese's social policy agenda.

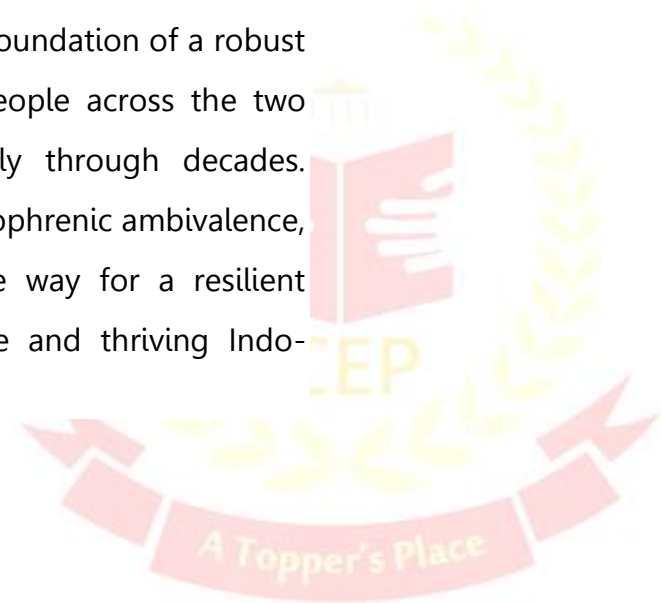
Trade with China has helped Australia put the cost of living on a downward trajectory. Studies show that this trade relationship has increased disposable income of Australian households by an average of 2,600 Australian dollars, supporting around 600,000 jobs. While US maintains 10%

baseline tariff on Australian goods, 25% on automobiles and 50% on steel and aluminum, Beijing thanks to the China-Australia Free Trade Agreement applies an average of just 1.1%, urging Canberra to rethink before jumping on Washington's bandwagon vis-à-vis Beijing.

No wonder China is seen as a more reliable trade partner than the US by Australians with a sizeable majority of them (71%) agreeing that the country's relationship with Beijing is important. This comes as Trump has upended the long-held assumption that America could be a dependable ally, stoking a belief in many Aussies whether it could even act responsibly.

Establishing diplomatic relations, Beijing and Canberra in 1972 agreed to develop the relationship on the basis of the principles of mutual respect for sovereignty, mutual non-aggression, non-interference in internal affairs, equality, mutual benefit and peaceful coexistence.

These fundamental tenets laid the foundation of a robust Beijing-Canberra relationship as people across the two countries lived together peacefully through decades. Should Australia chuck out its schizophrenic ambivalence, both nations can still pioneer the way for a resilient strategic partnership and a secure and thriving Indo-Pacific ■



ICEP

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PREPARATION

VOCABULARY IN CONTEXT

DIFFICULT WORDS:

1. **Implacable** – Unable to be calmed or appeased; relentless.
2. **Belligerence** – Aggressive or warlike behavior or attitude.
3. **Truckle** – To submit or yield obsequiously to someone in power.
4. **Symbiotic** – Involving mutual benefit, especially between different species or systems.
5. **Volatility** – The tendency to change rapidly and unpredictably, often for the worse.
6. **Ambivalence** – Having mixed or contradictory feelings about something or someone.
7. **Rapprochement** – The re-establishment of harmonious relations between countries.
8. **Parasitic** – Relying on or exploiting others without giving anything in return.
5. **Open up** – To become more accessible or receptive, especially in trade or diplomacy.
6. **Budge to** – To change position or opinion under pressure.
7. **Break out** – To begin suddenly, typically used for conflict or war
8. **Rethink before jumping on (something)** – To reconsider an action before supporting or joining a cause or alliance.

IDIOMATIC EXPRESSIONS:

PHRASES:

1. **Take up the gauntlet** – To accept a challenge or confront a difficult situation.
2. **Truckle to** – To submit or yield subserviently to someone's authority or demands.
3. **Stabilise relations** – To make a diplomatic or political relationship more steady and predictable.
4. **Tap into** – To access or make use of a resource or opportunity.
1. **Take up the gauntlet** – To accept a challenge or responsibility and act on it with determination.
2. **Jump on the bandwagon** – To join or support something just because it is popular or everyone else is doing it.

DECONSTRUCTION OF ARTICLE

JARGON/TERMINOLOGIES:

Term / Jargon	Meaning
AUKUS	A trilateral security pact between Australia, the United Kingdom, and the United States focused on military cooperation, including nuclear-powered submarines.
Protectionism	An economic policy of restricting imports from other countries through tariffs or other trade barriers to protect domestic industries.
Symbiotic bond	A mutually beneficial relationship; in this context, it refers to the complementary economic relationship between Australia and China.
Structural deficit	A budget deficit that persists even when the economy is operating at full capacity, indicating a long-term fiscal imbalance.
Constructive meeting	A diplomatic term implying a positive, cooperative discussion that aims to resolve differences and build

mutual understanding between countries.

BROADER THEMES & APPLICATIONS:

1. **Shifting Global Alliances** – Nations are reconfiguring their foreign policies to adapt to unpredictable superpower behavior and multipolar geopolitics.
2. **Economic Interdependence** – Deep trade and investment ties can act as stabilizing forces in international relations
3. **National Sovereignty vs. External Pressure** – Countries like Australia must balance strategic autonomy against the influence of dominant allies like the US
4. **Military Diplomacy and Strategic Mistrust** – Divergent defence narratives can undermine diplomatic efforts and fuel unnecessary regional tensions
5. **Trade as a Tool of Social Stability** – Robust economic engagement (e.g., with China) can help lower living costs, support jobs, and fund social programs.

KEY QUESTIONS:

1. How has Donald Trump's foreign policy reshaped the strategic priorities of America's traditional allies like Australia?
2. In what ways does Australia's trade relationship with China offer more economic benefits than its ties with the United States?
3. Can Australia maintain a balanced diplomatic stance between economic cooperation with China and strategic alignment with the US?
4. How do internal disagreements within the Australian government risk undermining its foreign policy goals with China?
5. What long-term implications could Australia's increasing independence in foreign policy have for regional stability in the Indo-Pacific?

ICEP
CSS – PMS
PREPARATION

Reform or relapse

Syed Asad Ali Shah

July 29, 2025

OUTLINE:

1. **Headline Economic Improvement**

- \$2.1 billion current account surplus – highest in 22 years
- Foreign exchange reserves up to \$14 billion (from \$3.5B)
- No increase in foreign debt; aided by \$8B surge in remittances

2. **Underlying Weaknesses**

- Surplus driven by remittances, import suppression, and IMF-imposed controls
- Exports remain low-value and undiversified; investment and industrial activity remain weak
- Stock market gains reflect sentiment, not real economic transformation

3. **Socioeconomic Distress**

- Poverty at 44%, unemployment over 20%
- Real wages stagnant; high interest rates; low business confidence
- Citizens bear the brunt of economic stabilisation

4. **Fragile Foundations**

- Stability rests on remittances, debt rollovers, and fiscal tightening

- Sustainability in question post-IMF programme (ending Oct 2027)
- Risks of another crisis unless structural reforms are pursued

5. **Urgent Governance Reforms Needed**

- Improve public financial management and fiscal transparency
- Promote PPPs in social sectors to avoid bureaucratic inefficiency
- Civil service reform for merit and performance
- Strengthen judicial system and contract enforcement
- Expand tax base with equitable, tech-driven reforms



Pakistan has posted a \$2.1 billion current account surplus in FY25, the highest in 22 years. Foreign exchange reserves have climbed to \$14 billion, up from a dangerously low \$3.5 billion just two years ago.

Notably, this improvement has occurred without a parallel increase in foreign debt, prompting many to hail it as a sign of macroeconomic recovery. These headline figures are encouraging, but they reveal only part of the picture; deeper structural weaknesses remain unaddressed.

The review of the external account clearly established the fact that the surplus has been driven primarily by an unprecedented \$8 billion increase in remittances, reflecting the continued support of Pakistanis abroad. Modest export growth, strict fiscal controls and policy

discipline – much of it under the IMF programme – have also contributed. Continued debt rollovers by friendly countries such as Saudi Arabia, the UAE and China have also helped Pakistan avoid an external financing crisis.

Investor sentiment has improved, at least in the secondary market of the Pakistan Stock Exchange, where the KSE-100 index has surged past 130,000 points, and market capitalisation now nears \$60 billion. However, this surge reflects short-term optimism rather than a genuine structural transformation.

But beneath these numbers lie serious concerns.

This surplus is not the product of improved productivity, robust exports, or a revived domestic economy. Instead, it reflects a combination of external inflows and internal economic suppression. Remittances, while critical, are not a sustainable substitute for domestic export capacity. Export growth remains concentrated in low-value textiles, and imports are depressed, not due to efficiency or substitution by domestic production, but due to stagnant demand and weakened purchasing power.

Private investment remains sluggish and industrial activity is yet to recover. In effect, this so-called stabilisation has come at a significant cost – a cost borne by ordinary citizens.

According to the World Bank, poverty in Pakistan has risen to 44 per cent, and unemployment exceeds 20 per cent, particularly among educated youth. While headline inflation has declined, real wages have stagnated, and

purchasing power continues to erode. Interest rates, though significantly down, remain in double digits, discouraging credit expansion and capital investment. Business confidence remains low, and risk appetite muted.

This has created a precarious macroeconomic equilibrium. On paper, the government's external accounts appear better, but the real economy is struggling and citizens are finding it difficult to survive.

Worse still, the apparent stability is neither homegrown nor durable. It rests on three fragile pillars: record remittance inflows, IMF-imposed fiscal controls (including a punitive tax regime that hinders growth), and external debt rollovers. None of these offers a reliable path to sustainable development.

If Pakistan fails to utilise this temporary window to implement deep and broad-based reforms, it may face another economic crisis once the current 37-month IMF Extended Fund Facility expires in October 2027.

The country faces substantial external repayment obligations in the coming years. Without meaningful gains in exports, investment, and savings, the question of debt sustainability will resurface. Pakistan has seen this movie before – a brief calm, followed by a crisis when the scaffolding is removed.

What's needed now is not just economic adjustment, but a fundamental restructuring of both the economy and the state's governance apparatus. At the heart of Pakistan's

recurring economic malaise lies a failure of governance across federal, provincial and local levels.

Key governance reforms in Pakistan must address several critical areas. First, public financial management needs a major overhaul to ensure that budgets are directly linked to measurable outcomes. This requires greater transparency, fiscal discipline, and a focus on achieving value for money in public spending. Second, public-private partnerships (PPPs) should be prioritised in sectors like education, health, population control and agriculture. By leveraging the private sector through outcome-based partnerships, the state can avoid the pitfalls of expanding inefficient and unaccountable public bureaucracies.

Third, civil service reform is essential. A merit-based, performance-oriented bureaucracy is vital for effective policy execution, whereas the current culture of politicisation, inefficiency and lack of accountability seriously hampers service delivery.

Fourth, judicial and contract enforcement reforms are urgently needed. Weak contract enforcement discourages investment and erodes public trust in the rule of law. Restoring commercial justice and legal credibility is foundational for sustained economic progress. Fifth, the tax administration must be overhauled to expand the tax base through equitable and technology-driven systems. This also means reducing reliance on regressive indirect taxes and cutting exorbitantly high rates that currently suppress business growth.

Lastly, empowered local governments are crucial for service delivery. Without functional and autonomous local bodies, it is impossible to provide essential services such as water, sanitation, waste management and local infrastructure. Devolution must be realised both in spirit and in practice.

At the same time, Pakistan must implement targeted economic reforms to unlock its potential. Export diversification is a top priority. The country's heavy reliance on textiles must end, with greater support extended to high-potential sectors such as information technology, pharmaceuticals, engineering goods, and agro-processing. These sectors require assistance in branding, building compliance capacity, and gaining access to global markets. Improving the investment climate is equally critical. This involves ensuring policy predictability, rationalising taxation, improving regulatory efficiency and reinforcing legal certainty to attract both domestic and foreign investment.

In addition, capital market deepening must be pursued. The recent stock market surge should translate into real capital formation, which means incentivising IPOs and fresh listings through fiscal reforms, streamlined regulations and stronger institutional investor participation. The energy sector also needs urgent restructuring. Without a reliable and affordable energy supply, industrial growth will remain elusive.

Challenges such as circular debt, line losses, poor governance and high tariffs must be tackled head-on.

Finally, investment in human capital is non-negotiable. Pakistan's youth bulge could quickly become a demographic disaster unless immediate steps are taken to invest in education, healthcare, vocational training, and digital inclusion.

Finally, fiscal discipline must be internalised. It must be based on an innovative domestic agenda, not just IMF conditionalities. Sustainable outcome-based budgeting, targeted subsidies and inclusive safety nets must become part of a long-term national strategy, not emergency responses.

None of this is easy. These reforms require political courage, risk-taking, administrative capability and long-term commitment – all of which have historically been in short supply. But the alternative is worse: continued dependency on the IMF & co, deepening poverty and another cycle of collapse.

The \$2.1 billion current account surplus is not a badge of economic success. It is, at best, a narrow window of opportunity. If used wisely, it can be the platform for renewal. If squandered, it will simply be remembered as another fleeting moment of calm before the storm.

Poverty has deepened. Unemployment has risen. Governance has further eroded. And the margin for error is now dangerously thin. Pakistan has already lost valuable time, with the first year of the IMF programme yielding little in terms of structural reform. The second year is not

just another opportunity; it may well be the last viable chance to correct the course.

What we do now will determine whether we confront our foundational weaknesses with resolve or slide once again toward the next inevitable crisis ■



ICEP

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PREPARATION

VOCABULARY IN CONTEXT

DIFFICULT WORDS:

1. **Macroeconomic** – Relating to the economy as a whole, especially large-scale factors like growth, inflation, and employment.
2. **Remittances** – Money sent by individuals working abroad back to their home country.
3. **Suppression** – The act of forcefully reducing or restraining something, such as demand or activity.
4. **Equilibrium** – A balanced or stable state where opposing forces or influences are equal.
5. **Malaise** – A general feeling of discomfort, unease, or poor functioning, often referring to a society or economy.
6. **Devolution** – The transfer of powers and responsibilities from central to local governments.
7. **Diversification** – Expanding into different products, markets, or sectors to reduce risk and dependency.
8. **Conditionalities** – Conditions or requirements attached to financial assistance, especially by institutions like the IMF.
2. **Roll over** – To extend the repayment period of a loan or debt (e.g., countries rolled over existing loans).
3. **Bear out** – To support or confirm something (e.g., data bears out concerns about the real economy).
4. **Fall back on** – To rely on something when other options fail (e.g., Pakistan falls back on remittances).
5. **Give in** – To yield or submit, often reluctantly (e.g., giving in to IMF demands).
6. **Cut down** – To reduce or decrease (e.g., cut down on public spending or imports).
7. **Step up** – To increase effort or take stronger action (e.g., step up reforms or investments).
8. **Break down** – To fail or collapse due to internal problems (e.g., when governance systems break down).

PHRASES:

1. **Climb up** – To increase or rise to a higher level (e.g., reserves climbed up to \$14 billion).

IDIOMATIC EXPRESSIONS:

1. **Calm before the storm**: A peaceful or stable situation that is likely to be followed by trouble or chaos.

DECONSTRUCTION OF ARTICLE

JARGON/TERMINOLOGIES:

Term / Jargon	Meaning
Current Account Surplus	When a country earns more from exports, remittances, and other inflows than it spends on imports and payments abroad.
Foreign Exchange Reserves	The stock of foreign currencies held by a country's central bank to back liabilities and support the national currency.
Debt Rollovers	Extension or renewal of debt repayment deadlines, allowing a country to delay paying back loans.
Fiscal Controls	Government policies aimed at regulating spending and taxation to maintain budgetary discipline.
Remittances	Money sent home by citizens working abroad, often a major source of foreign exchange for developing countries.
Macroeconomic Equilibrium	A stable state in the economy where aggregate demand equals aggregate supply, balancing key

	indicators like inflation, growth, and unemployment.
Public-Private Partnerships (PPPs)	Collaborative agreements between the government and private sector to fund and operate public services or infrastructure.
Export Diversification	The strategy of broadening the range of products and markets for a country's exports to reduce dependence on a single sector.

BROADER THEMES & APPLICATIONS:

1. **Macroeconomic Stability vs. Real Economy:** Headline surpluses must translate into real, inclusive economic progress.
2. **Governance and Institutional Reform:** Sustainable growth depends on transparent, accountable, and capable state institutions.
3. **Human Capital Development:** Investing in education, health, and skills is essential to leverage Pakistan's youth bulge.
4. **Structural Economic Transformation:** Diversifying exports and reviving private investment is key to long-term resilience.

5. **Time-Sensitive Reform Imperative:** The current stability offers a short window to enact deep reforms before another crisis emerges.

KEY QUESTIONS:

1. What structural reforms must Pakistan prioritise to convert short-term external stability into long-term economic resilience?
 2. How sustainable is Pakistan's current account surplus if it continues to rely heavily on remittances and suppressed imports?
 3. What are the risks of delaying deep governance reforms, especially in public financial management and civil service?
 4. Can Pakistan achieve meaningful export diversification without resolving foundational issues in energy, tax policy, and investment climate?
 5. How can fiscal discipline be internalised and made independent of IMF conditionalities to ensure future economic sovereignty?
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PREPARATION