

ArthaShastra

u n b i a s e d *Insights*



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From the Editor's Desk...



Dear Reader,

This issue of **ARTHASHASTRA** (Volume 2, Issue 2) brings together insights from across the Global South on a range of diverse subjects. Yet one theme unites them all: countries in the Global South must invest in building their local absorptive capacities.

What do we mean by absorptive capacity? Does it mean more roads, more buildings and greater connectivity?

Infrastructure matters. Better transportation, for instance, enables greater mobility, allowing more people to reach learning centres. It is a real and meaningful gain.

But here is a distinction worth holding on to. A road can bring someone to a learning centre. What happens when they arrive? Are they equipped to learn, question, adapt and apply what they encounter?

This is where I have come to understand, absorptive capacity lives: not in any one place, but distributed across the entire system. It lives in the roads *and* the centres *and* the curricula *and* the institutions *and*, above all, the people. That is why building absorptive capacity must be **systemic**. It cannot be built through piecemeal or isolated interventions.

For far too long, countries across the Global South have received piecemeal investments. World-class infrastructure is created, while the human capacity required to make productive use of what flows through it is too often neglected.

So, where should these nations invest?

After exploring this question from multiple angles, the answer consistently returns to one foundation: **learning that is both interdisciplinary and experiential, cultivated domestically and across borders.**

What does experiential learning look like?

I once posed this question to a professor and dean at a leading UK university. His answer stumped me. More so, because the idea is simpler and more humane than it is usually made to sound.

At its core, experiential learning insists that what a person feels, observes, questions, and reflects upon is not noise to be filtered out; it is an integral part of the learning process itself. This approach does not discard data or evidence; it illuminates them by connecting what is measured with what is experienced.

At The Global South Convergence Forum (GSCF), we are moving this idea off the page and into practice. In many ways, the articles in these pages are our proof of concept unfolding in real time.

As our lead piece argues, *Mould-Thinking* cannot be learnt through classroom instruction alone. It must be imbibed through one's own two hands, where a mistake in pouring becomes a lesson rather than a loss. The principle is learnt because it is encountered, tested and reflected upon in practice.

What is striking is how far this principle scales.

What the hand learns at a workbench, a sector learns in a candid, closed-door room where tooling veterans exchange the tacit knowledge that no keynote slide can carry. A nation learns by sending its people across borders - as when Dr Mugambwa walked through the fields of Yunnan, returning not with a template to copy, but with principles to interpret and adapt. Likewise, the discussion on BRICS considers how labour mobility can enable knowledge to move across borders and become embedded locally.

The tooling professionals put it best: industries are ultimately shaped by the people in them, and the most important link remains the human one.

The alternative is instructive, and this issue presents that too: knowledge that is available but never absorbed; expertise that is documented in abundance but not heard. Eventually, it amounts to little more than the avoidable cost of learning the hard way. The workbench teaches us to plan the exit before we pour. Much of the world, as our writers on Iran observe, is still learning that lesson through consequence rather than reflection.

Together, these contributions return us to the same proposition: the economic develop-

ment of the Global South will not be determined by how much knowledge it can access. It will be determined by how much of that knowledge it can absorb, adopt, adapt and make its own.

So, dear reader, unbiased insights in **ARTHASHASTRA** will hopefully trigger and provoke unthought-of thoughts, giving a fillip to a positive and offbeat direction. Until next time, keep your thinking caps on. Yes, we eagerly await your comments, suggestions, advice or criticism.

Warmly,

A handwritten signature in cursive script, appearing to read 'Natasha'.

Dr. Natasha Agarwal

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We look forward to hearing from you at :
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Moulds: Think...Design...Create

A Two-Day Experiential Workshop

An initiative by The Global South Convergence Forum

The mother of a product

Imagine...

...walking through a marketplace filled with products of every kind: pens, cups, phone cases, ceramic pots, machine parts, packaging tools, and objects designed for countless purposes. As you look at them, you wonder:

- *How was this actually made?*
- *Can this object be modified to better suit my needs or the needs of my customer?*
- *How can a sketch on paper be transformed into a tangible reality?*
- *Once a product is made, how can it be replicated at scale - efficiently and economically?*

These questions spark your imagination, but the tool that translates raw imagination into a tangible reality is the **mould**. Often called the *mother of a product*, a mould is the invisible hand. It is rarely seen, but always present behind almost every object in our modern world.

The question then is: *How are moulds made?*

Closing the gap: What is mould-thinking?

It begins with *thinking* differently. We are talking about developing **mould-thinking** - the ability to look at an object (whether it is a sketch on paper, a prototype or a finished product) and instinctively know how it came into existence.

That kind of ability is surprisingly rare. Even more surprising is that it is a *learnable skill*. And that is exactly what this workshop is all about.

In this two-day experiential workshop, you will develop your **mould-thinking** ability: *an out-of-the-box thought process using an inside-out approach*.

We teach **mould-thinking** using silicone.

Why silicone?

This is because **mould-thinking** cannot be taught in a classroom with instructions alone. It has to be imbibed on a workbench. You work with it to think about it.

Silicone brings every mould principle down to a workbench, within reach of your own two hands. For example, silicone's liquid state forces you to see the hollow space that produces an object, not the object itself. The flow of silicone reveals the logic of material behaviour - why air must escape a mould, why material must reach every corner. And silicone demands that you plan the exit before you pour - training you to see every facet of every object as a demoulding problem.

Silicone does not hide what is happening. When something goes wrong, you can see exactly why. You will make mistakes while working. Some of what you pour will not come out the way you want. And that is precisely the point.

In other words, silicone is forgiving enough that your mistakes become lessons rather than losses, but honest enough that the principles it teaches are the same ones that govern how most moulds are made.

By the end of the workshop, you will not just know how to make a mould using silicone. You will understand why moulds work the way they do. And you will carry *that understanding* into whatever you create next.

Master this workshop, and you will not only understand how moulds are made but also how ideas are transformed into prototypes, products, and scalable solutions.

Come, mould your future. Learn **mould-**

thinking with us. In only two days

Who will lead the workshop?

The workshop will be conducted by **Paresh R. Batra**. He is a manufacturing entrepreneur with over two decades of experience in the silicone mould industry. Over the years, he has engineered custom solutions for a wide-ranging clientele, spanning luxury brands, high-profile celebrities, and NGOs. He brings a rare blend of deep industrial insight, refined design aesthetics and extensive execution experience directly to the classroom.

His unique background ensures participants gain insights into how design concepts adapt to scalable processes.

Who is this for?

The workshop is open to students, creators, entrepreneurs, and learners from all backgrounds who are curious and eager to develop a high-value skill. **No prior experience in engineering, moulds, or silicone-making is required.**

Our participant profile typically falls into the following major categories:

- **Creative Entrepreneurs, Makers & Artisans:** Designers, DIY enthusiasts, and artists looking to create custom products (e.g., home decor, resin art, candles, toys) and transition seamlessly from one-off pieces to scalable, small-batch production.
- **MSMEs, Product Developers & Engineers:** Small business owners and industry professionals exploring low-cost prototyping, custom product replication, packaging solutions, or advanced silicone industrial applications.
- **Students & Job Seekers:** Individuals from design, art, engineering, or other vocational streams looking beyond textbooks and acquire a rare, high-demand,

industry-ready skill that sets their resume apart.

- **Educators & Skill Trainers:** Instructors and institutional trainers interested in introducing professional, hands-on mould-making and “mould-thinking” frameworks into their own educational curricula.

Duration and Format

- **Duration:** Two-day intensive workshop from 9:30 AM to 6:00 PM.
- **Batch Size:** Limited to 10–20 participants per batch to ensure personalised, one-on-one guidance.
- **Language of Instruction:** English and Hindi.
- **Mode:** Offline, fully hands-on workshop format featuring live demonstrations and independent yet guided practical sessions.
- **Workshop Approach:** Beginner-friendly, focused on experiential learning.
- **Materials & Safety:** All specialised mould-making materials, tools, and safety gear (gloves/aprons) are provided. Participants should wear clothes that they do not mind getting permanently stained or that can be discarded afterwards.
- **Takeaways:** Participants will take home the silicone mould they create during the workshop.
- **Geographical Reach:** Conducted across India at approved partner institute venues.

Contact us!

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Land, Leadership and Rural Transformation

Lessons from China for Uganda

Dr. Joshua Mugambwa



Dr. Joshua Mugambwa

Rural transformation is no longer a peripheral policy concern. Across Africa - where the majority of citizens still live in rural areas and depend on agriculture for their livelihoods - it lies at the heart of national development.

During my recent visit to China at the invitation of China Agricultural University (CAU), I had the opportunity to examine firsthand how one of the world's largest agrarian societies is navigating rural revitalisation. Through conferences and field visits, particularly in Yunnan province, I observed a model of rural transformation anchored in land governance, state coordination and institutional leadership. My visit was guided by leading rural development scholars, including Professor Li Xiaoyun and Professor Tang Lixia of CAU. Professor Li is widely recognised for advancing a “human-land-industry” framework that integrates land reform, poverty reduction and sustainable agricultural modernisation. Professor Tang's research focuses on livelihood diversification, agricultural transition and inclusive rural development. Both scholars emphasise field-based research and policy innovation grounded in lived rural realities. Their work provided an analytical lens through which to understand China's rural transformation - and to reflect on possible lessons for Uganda.

Rural transformation matters for Africa

Across Africa, agriculture remains central to GDP, employment, food security and export

earnings. Continental frameworks such as the African Union's Agenda 2063, the Comprehensive Africa Agriculture Development Programme (CAADP), and the Maputo and Malabo Declarations all identify agriculture as a driver of inclusive growth and poverty reduction. Globally, the Sustainable Development Goals - particularly SDGs 1, 2, 8 and 10 - place rural development at the centre of sustainable transformation. Yet rural poverty, land inequality, youth migration, weak infrastructure and low productivity persist across much of the Global South. As African countries pursue industrialisation and urbanisation, a pressing question emerges: *Can rural areas become engines of growth rather than reservoirs of poverty?*

It was within this broader context that I examined China's approach.

Land governance and policy architecture in China's rural revitalisation

China's rural transformation is underpinned by a comprehensive national policy framework, most notably the Rural Revitalisation Strategy launched in 2017. The strategy advances five core objectives: industrial vitality, ecological sustainability, effective governance, cultural renewal and improved living standards. Following the 2020 declaration that extreme rural poverty had been eradicated, policy emphasis shifted toward agricultural modernisation and long-term rural prosperity, while retaining the principle of collective land ownership. Under China's Constitution and the Land Administration Law, rural land belongs to village collectives, with households granted long-term, legally protected use rights through the Household Responsibility System. Recent reforms - including the extension of land contracts and the “Three Rights Separation” reform (distinguishing ownership, contract rights and man-

agement rights) - have enhanced tenure security while permitting land transfer and consolidation to support scaled and commercialised production.

This legal and institutional architecture enables coordinated land management, strict land-use classification to safeguard national food security, and structured rural planning aligned with broader development goals. Village committees possess the authority to reorganise fragmented holdings, facilitate agribusiness expansion, and attract external investment without privatising land. Field observations in Yunnan province illustrate how this framework operates in practice. Rural land remains collectively owned, households retain transferable user rights within regulated categories - agricultural, residential, construction or forest - and land may be reallocated if families permanently relinquish village membership. Such arrangements allow local leaders to consolidate plots, redesign settlements and implement reconstruction initiatives with relative efficiency. The result is a multi-level governance system in which village authorities, local governments, universities, enterprises, NGOs and residents collaborate within a clearly defined policy structure to advance rural revitalisation.

The central role of the State in China's rural development

Perhaps the most striking feature of rural China is the visible and sustained commitment of the state. Modern infrastructure - roads, electricity, sanitation, healthcare, schools and digital connectivity - extends deep into rural areas. Environmental sustainability and biodiversity conservation are integrated into planning. Local governance structures actively monitor implementation, often using incentive systems to encourage compliance and community participation. Government facilitation is also critical in attracting investment. In the absence of private land ownership, large-scale speculation is limited. Instead, village leadership mobilises partnerships, drawing entrepreneurs and managerial talent into rural communities. However, the system is not without challenges.

The absence of private property rights may dampen incentives for long-term capital investment by individual farmers. In some areas, wage employment appears more attractive than entrepreneurial risk-taking, leaving economic dynamism reliant on state support and external actors.

Uganda's land question: Opportunity and constraint

Uganda presents a markedly different context from China. Land is predominantly privately owned under a complex tenure system that includes customary, freehold, leasehold and mailo arrangements. Even when families migrate permanently to urban areas, land typically remains within the family. While private ownership can encourage long-term investment and security, it has also contributed to fragmentation, idle land and deepening inequality in some regions.

One of the most persistent challenges is the phenomenon of absentee landlords - registered land titleholders, often under the Mailo system, who neither occupy nor actively manage their land. In many cases, occupants (bibanja holders) cannot easily access or even locate these landlords. The result is chronic tenure insecurity, land conflicts and underutilization. Historical research shows that absentee Baganda landlords significantly disrupted land use patterns in districts such as Kibaale during both the colonial and post-independence periods. Although they held formal land titles, their physical absence created insecurity among Banyoro tenants, undermining long-term agricultural investment and rural stability. The land question in Kibaale remains emblematic of broader tensions within Uganda's land governance system. Government interventions - including the Land Fund aimed at compensating landlords and securing tenant rights - represent steps toward resolving these tensions. New regulatory efforts to streamline payment of busuulu (ground rent) through local councils also seek to formalise relationships between landlords and occupants. However, deeper structural reforms may be required to fully address historical grievances,

tenure insecurity and inefficient land use. Unlike China's collective system, Uganda cannot easily implement centralised village restructuring due to constitutional protection of private property. But this does not mean reform is impossible. The challenge is to design legally grounded, consultative solutions that promote both productivity and justice.

Uganda's rural development challenge

Uganda's agricultural potential is significant. With a favourable tropical climate and bimodal rainfall, the country supports multiple cropping seasons and produces a wide range of commodities, including coffee, maize, bananas, beans and tea. Agriculture contributes roughly 23-25 per cent of GDP, employs nearly 70 per cent of the workforce and accounts for over 40 per cent of export earnings. Yet the sector remains largely subsistence-based, with about 80 per cent of farmers operating on smallholder plots of less than two hectares.

More than 75 per cent of Ugandans live in rural areas, where poverty levels remain higher than in urban centres. Despite policy commitments under Vision 2040 and the National Development Plan (NDP III and NDP IV), structural constraints continue to limit transformation.

Agricultural funding remains below the 10 per cent Maputo/Malabo target, irrigation covers only about 3-4 per cent of farmland, and productivity remains low compared to potential yields. Rural infrastructure gaps - including limited paved roads, low electricity and internet access and high post-harvest losses - further weaken competitiveness. At the same time, land tenure insecurity under customary and Mailo systems discourages long-term investment. Together, these challenges slow rural transformation and constrain agriculture's ability to drive inclusive and sustainable economic growth.

Lessons for Uganda

China's experience offers important lessons

- not as a template, but as inspiration. First, sustained political commitment is essential. Rural transformation must be financed and treated as a national priority. Second, local governance matters. Empowered district and parish institutions can coordinate land-use planning, dispute resolution and development initiatives. Third, land governance reform is unavoidable. Addressing absentee landlordism, idle land and tenure insecurity - through structured leasing frameworks, land banks or incentives for productive use - could unlock significant agricultural potential. With high youth unemployment, government-backed programs that match unemployed youth with underutilised land, under transparent legal arrangements, could transform rural economies while reducing conflict. Fourth, modernisation and infrastructure are foundational. Irrigation, mechanisation, improved seeds, research-driven agriculture, and reliable transport, internet, and energy networks are critical. Fifth, research and universities must engage rural communities directly. Knowledge-driven transformation - as seen in China - strengthens sustainability and inclusiveness.

Way forward

The villages of Yunnan demonstrate that coordinated land management, strong governance and sustained public investment can convert rural communities into engines of national growth. For Uganda, the way forward lies not in replicating China's model wholesale, but in confronting its own land question decisively. Absentee landlordism, tenure insecurity and fragmented landholding are not merely legal issues — they are development constraints. If addressed through balanced reform, strengthened institutions and inclusive rural investment, Uganda's rural sector can become a foundation for employment, food security and shared prosperity. Rural transformation is not simply about farming. It is about land, leadership and the political will to ensure that rural citizens are not left behind in the march toward national development.

Dr. Joshua Mugambwa holds a PhD in Public Policy and Management from *Makerere University*, Kampala, Uganda. He is currently Dean of the Faculty of Management and a Senior Lecturer at *Makerere University Business School*, Kampala, Uganda. His research interests include leadership, governance, management, public policy, rural development, poverty reduction, business ethics, and work ethics. He is a co-founder of the *China-Uganda Research Network* and an active member of the *Global South Network for Comparative Rural Studies*.

Conversations: Shaping the future of India's tooling industry

It was a lazy Saturday morning when members of Team GSCF set out for Pune. The newly minted "Connecting Link" lived up to its name: a tunnel snaking through the Sahyadri ranges, seamlessly connecting us to conversations on India's tooling industry and its crucial role in the evolution of India's manufacturing ecosystem.

We reached our destination early in the afternoon. By then, over thirty professionals from across the manufacturing industry had settled into a conference room tucked deep in Pune's industrial belt. There was no fanfare, and no keynote slides - just a banner, a closed door and the kind of candid conversations that are rarely held in public forums.

freely over four hours. Around the room sat tooling professionals, OEM suppliers, product manufacturers, technologists and industry veterans - people carrying, between them, the collective experience, expertise and the vision to help shape a growing tooling industry that the Indian government is finally noticing.

The price of admission

Attendees were neither enamoured by the promise of manufacturing progress nor deterred by its complications. Their vision was clear - traditional tooling remains indispensable. But, the hook?

Precision, Quality and Technology!

These parameters are not just baseline survival metrics that any serious business in the industry must now meet. It is *THE* entry ticket for competing in global markets, according to the unanimous verdict.



Photo credit: LogicLoom IT Solutions Private Limited

Sharpening the Edge was moderated by Amit Singh, co-founder and CEO of **LogicLoom IT Solutions Private Limited**. Once the panel found its footing, the discussions flowed



From L to R: Aditya Kumar (Managing Director, Marcopolo Products Private Limited), Suneet Yadav (Toolroom Head, Uno Minda), Sachin Netrabyle (Business Head, Magna Plastics Corporation)

Because holding tighter tolerances is not a unique selling point anymore. Besides, the

Indian manufacturing ecosystem cannot afford to live in the technologies of the past.

As the moderator put it plainly, delay has a cost, and competition is at your door.

Therefore, the real question, most agreed to, is no longer *whether* to embrace manufacturing advancements - be it adopting or upgrading technological solutions for improving operational efficiency and thus long-term total factor productivity. Rather, it is *how* quickly enough to stay relevant, yet wisely enough to operate within geopolitical and geoeconomic constraints.

Policy tailwinds

To deliver reliability, repeatability and resilience on the shopfloor, discussions noted that holistic government support is imperative. However, recent government incentives and manufacturing-focused policy signals generated cautious optimism, at best. Because policy-making requires sustained and honest efforts from all the stakeholders, and is not a reflection of a gap in policy-making.

The Value of the Room Itself

The tooling sector's bottlenecks - ranging from capital access and complex land procurement to labour shortages that hinder India's global competitiveness - are too tangled to be solved by any single player in isolation.

Rooms like this one - small, closed, and candid - create something that larger industry forums rarely can achieve. The space to speak a business mind honestly.

The afternoon closed over light humour, refreshments, warm conversations, and mementoes presented to the panellists.



Dr. Natasha Agarwal presenting a token of appreciation to Mr. Rajeev Khade (Chief digital and industrial automation advisor at Amazure Technologies Private Limited. He is also an advisor and mentor to various MSMEs at the Confederation of Indian Industry (CII)).



Members of TeamGSCF with members of team LogicLoom

As India's manufacturing story continues to scale, it is tempting to measure progress in machines acquired and policies announced. But afternoons like these are a quiet reminder that industries are ultimately shaped by the people in them—those who care enough to sit together, think out loud, and ask the hard questions about where industries need to go.

The most important link, as ever, remains the human one and the honest conversations that move the needle forward.

Scholars, sycophants, and the war on Iran

What the experts always knew, and what Washington chose to ignore

Ahsan Shah, Irfan Ul Islam, M. Hanief Sheikh



Ahsan Shah



Irfan Ul Islam



M. Hanief Sheikh

The world has entered yet another week since the US-Israeli war on Iran began on February 28. A time where the word “ceasefire” has reached new heights of meaninglessness in Gaza and Lebanon. As the conflict continues overtly and covertly, one question deserves serious analytical attention: *how is it that given the vast scholarship available on Iran and the Iranian political system, most of it produced in the West, did the United States walk into a quagmire that has resulted in heavy damage to its Arab friends in West Asia, acute deficiency*

in terms of international support, and no discernible strategic gain? How did the American establishment pick a course of action so contrary to the wisdom of its own available expertise on Iran, and, evidently, to subsequent public opinion? The following is a brief exploration into this question.

How Iran is different - And not so much

From the perspective of political science, Iran is quite fascinating on many fronts. It is a system born out of political and social revolution, with a most unique arrangement of institutions designed to balance and decentralise power between competing elite interests—one that has, over the years, proved its worth in terms of state stability even under heavy external and internal pressures. US sanctions ironically punished the middle class, who are the drivers of gradual change. Sanctions have now further entrenched economic power away from the private sector.

Iran is not, in any possible way, similar to Iraq or Venezuela. The West knew this. If it didn’t know, it knows better now. Iran is not a personalist regime. The ingenuity of post-revolutionary Iran is that it created what Lucan Way and Steven Levitsky would call a “durable autocracy” born out of a “revolutionary regime” - one whose institutional depth derives precisely from the fact that it dismantled its predecessors and embedded loyalty into entirely new structures. Revolutionary parties and movements that come to power through mass mobilisation, Way and Levitsky argue, tend to build the most resilient, albeit authoritarian systems, because there is simply nothing left to defect to, and consolidate power against an “enemy”. In Iran’s case, the threat of external interference did not need a case to be made, since it has been an open secret for quite some time now.

Vali Nasr’s 2025 book *Iran’s grand strategy*:

A political history represents perhaps the most authoritative recent account of Iranian decision-making. He argues that the Islamic Republic's foreign policy cannot be reduced to ideology or theology. It is driven by a coherent strategic logic shaped by decades of war with Iraq, American containment, and the 2003 invasion of its eastern neighbour. Nasr has argued that Washington's understanding of Iran is "hopelessly inadequate and dangerously outdated". The former Obama advisor's analysis makes this war predictable.

As is becoming more evident in the aftermath of the assassination of Supreme Leader Ayatollah Ali Khamenei, it is the institution of the Supreme Leader which held authority in the state and not just the man, though he shaped the institution, and this authority is proving resilient so far. The institution acts as an arbitrator and balancer between competing elite factions, and Khamenei, for his part, was seen as an able manager in this regard. The executive authority in the Iranian political system has a built-in contingency for leadership succession; the system went into autopilot mode without falling apart. Ali Vaez of the International Crisis Group captured this precisely when he observed that Iran's leadership survived the opening phase of the war because there are multiple power centres with overlapping authorities, and that factionalism is simply built into the "DNA of the system".

Samuel Huntington argued that the primary measure of political development is not democracy or prosperity, but institutionalisation - the capacity of political organisations to adapt and maintain authority. By that measure, the Islamic Republic has institutionalised itself formidably. Therefore, external actors who mistake the absence of liberal democracy for the absence of political order do so at their peril. Iraq had Saddam Hussein; remove Saddam, and the state collapses into its constituent fragments. Iran has the Assembly of Experts, the Guardian Council, the IRGC, and the Supreme Leader's office. These interlocking institutions do not depend on a single individual for their coher-

ence. If the West's intelligence and academic communities understood this distinction, the policymakers chose to ignore it anyway.

Trita Parsi of the Quincy Institute has been, perhaps, the bluntest on what Trump got wrong at the foundational level. He argues that this war was presented by the Israelis as an easy and fast operation against a weak Iran (we see it as the same cakewalk logic that preceded Venezuela). However, Trump is realizing that the conflict with Iran is neither quick nor simple. The belief that assassinating Khamenei would cause the regime to implode reflects precisely the personalist-regime misreading that the scholarship had spent years refuting.

Trump's court and Waltz's first image

The erratic and ego-driven nature of the current American presidency and its sycophantic cabinet is widely reported in the Western media and needs no rehashing here. However, we may usefully turn Kenneth Waltz's first-image analysis on the Trump presidency itself, rather than on the Iranians, to explain the military turn in American foreign policy towards Iran after years of other forms of diplomatic and non-military pressure.

Waltz locates the causes of war in human nature, i.e., in the psychology, ambition, misperception, and ego of individual leaders. It is the least fashionable of his three images in mainstream International Relations scholarship, which prefers structural explanations. But it is the most illuminating when applied to the current moment in Washington. Vali Nasr has observed that the traditional tools of foreign policy analysis - trajectories of institutional policy, calculations of national interest, the momentum of bureaucratic expertise - break down entirely when one is dealing with the calculation of a single person, and what is in it for him personally. In the case of this war, Nasr notes, there is nothing really in it for the United States on the ground, which raises the question of why the escalation happened at all. This is a question that the first image is uniquely equipped to answer.

Parsi describes a pattern that should unsettle careful observers. The pattern is that of “deadlines, threats, ultimatums - and behind them, a growing recognition that none of it is working”. Trump’s increasingly volatile rhetoric reflects a leader who lacks escalation dominance. Trump is stuck in a situation that he can’t get out of without admitting defeat, given that Washington didn’t have a coherent set of objectives to begin with. In Parsi’s assessment, the United States may escalate, but not from a position of strength.

Ali Vaez has been equally unsparing. In his assessment, Trump has started a war he now cannot end. The point is not incidental; rather, it speaks directly to the first image. A cabinet selected for loyalty rather than expertise, a principal who conflates personal prestige with national interest, and a court culture that punishes dissent are not conditions under which sound strategic assessments travel upward through the bureaucracy. The scholarship on Iran existed. The institutional memory was there. What was absent was a decision-making culture willing to receive information that complicated the preferred course of action. This is what Waltz’s first image, applied structurally to a whole administration rather than a single leader, looks like in practice.

What expertise was always saying

The scholarship on Iran, based in the West, was neither obscure nor ambiguous. It held, broadly, that Iran is a state with genuine domestic resilience derived from revolutionary ideology and nationalist sentiment; that it has demonstrated a capacity to absorb punishment without regime collapse; that military pressure strengthens hardliners at the expense of reformists; and that the IRGC, far from being destabilised by external attack, derives much of its domestic political relevance from precisely such attacks. None of this required classified intelligence. It required listening.

Nasr’s work had argued that the maximum-pressure sanctions campaign that preceded this war had not weakened Iran into moderation.

Instead, it had hardened it, radicalised it, and made it far more determined that the United States could not be trusted. The size of Iran’s middle class - the social constituency most naturally inclined toward accommodation and reform - had been decimated. The more hardline leadership rose to the helm. Thus, when the war finally came, it arrived in a country that had been systematically stripped of the internal advocates for a different path.

Vaez’s observation on what the war actually produced is devastating in its concision. He states that in an attempt to prevent Iran from developing a weapon of mass destruction, the United States handed Iran a weapon of mass disruption, i.e. an effective control over the Strait of Hormuz, through which roughly one-fifth of the world’s crude oil and natural gas supplies normally flow. His observations reinforce that the war has not weakened Iran into submission; instead, it has strengthened its bargaining position while destabilising the global economy.

Levitsky and Way add a further dimension by observing that external confrontation tends to consolidate a regime’s internal position - rallying nationalist sentiment and marginalising those within the system who might otherwise push for accommodation. Iran’s political cohesion was forged in the crucible of the Iran-Iraq War (1980-88), and this elite cohesion is seen again in the latest war. Parsi has extended this point in the context of the latest war. He observes that the stark political choice being presented to ordinary Iranians is no longer between regime and opposition, but between supporting the war and opposing it. Anti-regime Iranians are increasingly saying that this is not the moment for internal political fights, but for defending the country. The war may have handed the Islamic Republic a nationalist legitimacy and political cohesion it had been losing.

Zarif and the road not taken

Perhaps the most instructive voice in this entire episode is that of Mohammad Javad Zarif, Iran’s former foreign minister, the architect of

the 2015 nuclear deal, and now an academic writing from Tehran in the middle of a war he had spent his career trying to prevent. Zarif has published a comprehensive roadmap for ending the conflict in Foreign Affairs, proposing that Iran place limits on its nuclear programme under international monitoring and reopen the Strait of Hormuz in exchange for an end to all sanctions - along with a mutual nonaggression pact and economic cooperation.

What is striking about Zarif's proposal is not its content but its timing and what it reveals about the trajectory of the war. Before the campaign, Iran's negotiating position was more ambiguous. After five weeks of strikes and the assassination of the Supreme Leader, Zarif has proposed permanent constraints, full ratification of the Additional Protocol, and complete material transfer of enriched uranium. The military campaign, in other words, lowered the floor of what Tehran is prepared to accept, which is precisely the opposite of what maximum pressure was supposed to achieve. As Zarif himself notes, calling Trump's demand for zero enrichment "fanciful," the question now is whether Washington has the discipline and credibility to close a deal at all. Parsi makes a pointed assessment that the administration may want a deal in principle, but it lacks both the discipline and the credibility to close one. Trump's erratic messaging and repeated reversals have left Tehran deeply doubtful about whether any agreement would hold.

Zarif's warning that a ceasefire without addressing the roots of the crisis would only delay further conflict is, in fact, a restatement of the entire analytical failure that produced this war. The roots of the crisis - Iran's strategic logic, its institutional resilience, its reading of American credibility, the domestic political economy of the Trump administration - were all knowable before the first strike. They were known. The expertise existed in abundance, produced by the very scholars whose assessments now read as prophecy.

The deficiency of the willing

The acute lack of international backing for the war is telling. The United States entered this conflict with a narrower coalition of supportive partners than any comparable intervention in recent memory. Arab states in the Gulf, regardless of their private calculations regarding Iranian regional influence, found themselves in the uncomfortable position of bearing the consequences of a war they neither formally supported nor could openly resist without incurring costs. Parsi has observed that the region - aside from Israel and perhaps the Emirates - is largely uncomfortable with the war, concerned not about a tidy regime change in Iran but about state fragmentation, internal conflict, large-scale refugee movements, and separatist tendencies that could spill across borders throughout the region.

This is how it unfolds when first-image irrationality interacts with second-image structures - the domestic political economy of the Trump court - and produces third-image consequences. Here, the results are in the form of a reconfiguration of regional alignments that serves none of the actors' stated interests. Vaez, when talking about possible ceasefire negotiations, has articulated the structural issue clearly. He states that without a diplomatic framework, any lull in fighting merely buys time without building anything substantive. A tenuous pause is not a sustainable ceasefire, and if maritime tensions and reciprocal accusations persist, the danger of miscalculation remains extremely high.

The question that will be asked even after the escalation ends is the structural question. If decisions follow contrary to the scholarship available to institutions, then what precisely is the foreign policy decision-making apparatus for? Huntington's answer, from a different context, remains apt where he argues that institutions exist to convert private impulse into collective, rule-bound action. Therefore, it can be argued that when the institution is captured by the impulse, you get the war on Iran.

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BRICS+ will benefit from opening way to free movement of workers

Member states can better absorb technology with infusions of human capital

Dr. Natasha Agarwal

The decision last month by the BRICS group to expand its membership by admitting six more countries is based on a vision of advancing the interests of the Global South.

The creation of an 11-member BRICS+ sends a message to the world that change is the new constant and indicates a recognition of the need for inclusive and peaceful economic growth and development resilient in the face of geopolitical upheaval.

Leaders of this expanding group of countries joined together in Johannesburg to call for greater collaboration and cooperation in areas including the digital economy, green development, financial exchanges and inclusivity, international trade and investment, and people-to-people exchanges.

These countries are finding they have great technological knowledge that they can share with one another to facilitate closer economic integration, including India's successful experience with building digital public infrastructure such as the Unified Payments Interface system used for mobile payments.

In his address to the summit, Chinese President Xi Jinping pledged to set up what he called the China-BRICS Science and Innovation Incubation Park for the New Era and to look at setting up a BRICS platform for sharing satellite data. The leaders also agreed to set up a study group to explore and analyze artificial intelligence.

For BRICS+ nations, technological ad-

vancement and innovation are economic imperatives.

Technological transfers can be direct, with know-how shared with little restriction in study groups or corporate joint ventures. Technological advancement has meant that direct technological transfers can also happen through the utilization of open source software tools and the like.

In a globalized economy, technological transfers do not happen only through direct channels. Indirect channels such as technological spillovers can play a crucial role through mechanisms such as the cross-border movement of workers, corporate competition, imitation of foreign technologies and reverse engineering, and the integration of foreign technologies into domestic production.

Researchers have found ample evidence to show that spillovers have been a catalyst in determining countries' technological growth trajectories. The magnitude of technological spillover, though, largely depends on a country's ability to absorb and assimilate available knowledge, which in turn relates to the skills of its workforce, the state of its infrastructure, its institutional framework and its openness to structural reforms.

Countries must invest time, money and effort in structural and institutional reform. In this way, the development of a country's absorptive capacity and the capabilities of its people to capitalize on technological spillovers can be the impetus for shifting to a new development

paradigm.

At the BRICS summit, India and China highlighted reforms they have been pursuing to transform their economies and remain competitive in appealing to global capital and skilled workers.

Investment in education, whether by public authorities or by domestic or foreign private capital, is an obvious channel for improving the population's capacity to absorb new technologies. BRICS+ members should support their nationals in seeking knowledge at one another's institutions of learning through student exchanges and scholarship programs.

At the same time, it is important that governments create environments that will persuade nationals who study abroad that it is worthwhile to return home to pursue their careers while enabling seamless integration back into domestic society and the workforce.

Member states can also augment their human capital by tapping talented workers from other BRICS+ states or beyond, whether in terms of a short-term employment exchange or long-term residency. The free flow of labor across BRICS+ borders can enhance national capacity.

It is laudable that BRICS+ countries envision cooperating in the areas of education and skill development to promote vocational education and explore joint opportunities in digital education. This vision could facilitate the establishment of a pooled human resources foundation across the BRICS+.

To complement this vision, members should look at encouraging the free movement of persons across BRICS+ borders as well as the possibility of a common BRICS+ visa. As that may be too ambitious in the short term, BRICS+ governments could look at interim measures such as visa-free travel, visas on arrival or even just express airport immigration lines for nationals from member states. This would also support intra-bloc health tourism.

Such measures would ensure greater BRICS+ integration and give the group a stronger voice in advocating for free movement on a wider global scale.

BRICS+ states are embracing a multipolar world as they pursue an independent path of economic growth and development through an interconnected world. This show of political will can bring economic benefits for the people of BRICS+ nations.

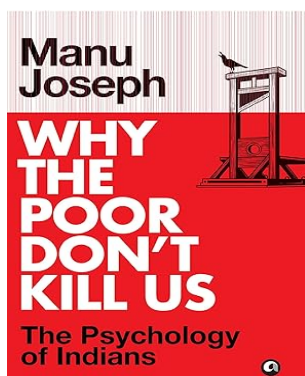
Dr. Natasha Agarwal is a research economist and founder of The Global South Convergence Forum. The article was originally published in Nikkei Asia on September 19, 2023 and can be accessed at <https://asia.nikkei.com/Opinion/BRICS-will-benefit-from-opening-way-to-free-movement-of-workers>.

Media Quotes

South China Morning Post (SCMP) in their article [India proposes reopening government bidding to Chinese firms as ties thaw](#) published on January 14, 2026 quotes **Dr. Natasha Agarwal**:

“China has clearly established its role in global politics. Concerning India, Beijing will operate from a space where it deeply understands Delhi's equation with the US, and thus its potential impact on China” she said, adding that “China is going to give what it wants to give and at the cost price, financial and non-financial, it wants to give. India has done little and continues to do little when it comes to easing concerns from China. Businesses cannot operate in such an uncertain environment.”

Recommended Reads



Book Title: Why the poor don't kill us: The psychology of Indians

Author: Manu Joseph

Reviewer: Paresh R. Batra

Review: It was a lazy Saturday afternoon, and the weekend looked relaxing. But a soft “plop” broke my reverie when a book landed softly on my desk. “*Yeh aap ke liye hai (this is for you)*,” the office attendant muttered before walking away. My single half-opened eye read “*Why the Poor Don't Kill Us*”.

I looked up the author Manu Joseph immediately. Born into a Christian family in Kerala and raised in erstwhile Madras, he is known for his contrarian columns and psychologically observant writing. Peculiarly, he distrusts moral certainty, dislikes ideology and the comfort zones it offers and has an overly keen eye for the absurdities of human behaviour. And this is brilliantly evidenced by the way the book is written.

At the heart of the book is a compelling idea: that human beings adapt psychologically to inequality. The poor are not perpetually angry revolutionaries waiting to burn society down. They adjust, aspire, normalise, survive and move on. An interesting insight. And

largely true too. And then the problem begins - when this one insight is stretched into an explanation for almost everything else.

Manu moves from psychological adaptation to critiquing activism, social justice, inequality, and public morality. Mostly not offering these subjects the depth they demand. He rather relies on anecdotes, observations, assumptions and conversational provocations. And thus, many conclusions appear flawed.

For instance, on page 248, he writes “*Humanitarianism has become a magnet for the mentally unstable who are compelled or wish to see unhappiness in everything.*”

Thought-provoking.

At other moments, his humour works well - sharp and on cue. But at times this stretches and feels excessive, as though provocation is itself the point. The tongue-in-cheek is so often that you forget where one ends and the other begins. And you end up thinking of a swollen cheek at all times.

The author aggressively questions activism and identity politics, but rarely subjects his assumptions to the same aggression.

Using a very narrow lens, he reduces everything - politics, inequality, activism, and dare I say even human suffering to almost a farce. *Why the Poor Don't Kill Us* is not an unintelligent book. In fact, its danger lies in how intelligent it sounds. If provocation was his wont... Manu Joseph surely achieved it with this book.

Of course, it's a book difficult to ignore, and that is what the author was aiming for all along.

Paresh R. Batra is a business consultant at The Global South Convergence Forum (GSCF).



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