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He Will Not Give Up

by Ahmed Charai

I went to present Jared Kushner with the Abraham Shield Award 2026 because of what he had achieved. I left thinking even more deeply about who he is.

We spoke for nearly an hour. There was no ceremony in his manner, no distance and none of the self-importance that so often accompanies power. He was relaxed, warm and remarkably down-to-earth.

He asked questions—not the questions of someone waiting for his turn to speak, but those of a man genuinely seeking to learn. He listened carefully. He tested ideas. He wanted to understand.

What struck me most was his humility.

Here was a man who had sat with presidents, kings and prime ministers; who had been entrusted with one of the most intractable conflicts of modern history; and whose work had helped alter the political landscape of the Middle East. Yet he carried none of the weight of his

résumé. He seemed far more interested in the work still ahead than in the credit already earned.

Then he told me something simple: he would not give up.

There was no drama in the words. They were an expression of conviction—the promise of a man who believes that the next generation deserves a different future. Those words remained with me.

Behind them lies a disarming optimism: a belief that history is not a prison and that the failures of one generation do not have to become the inheritance of the next. Jared believes that young people across the Middle East deserve more than the old vocabulary of grievance, suspicion and war. They deserve the opportunity to meet, build, trade and prosper—and, through shared success, to discover one another as human beings.

I also came to understand something essential about both the man and his method: Jared is not a prisoner of Republican or Democratic orthodoxy.

He listens to both, but belongs intellectually to neither. He refuses to allow inherited doctrines to place artificial barriers in front



Jared Kushner receives the Abraham Shield Award 2026 from World Herald Tribune, Inc.

of necessary initiatives. His first question is not, “What is our side supposed to believe?” It is a more demanding one: “What does reality require—and what can actually work?”

This is not an absence of conviction. On the contrary, it takes conviction to resist the comfort of a ready-made political answer. His independence enables him to see possibilities that partisan reflexes often conceal. It also explains how he could challenge decades of diplomatic convention without becoming doctrinaire about his own alternative.

For him, a method has value only if it produces results—if it brings people closer to peace, dignity and a better life.

This is why *World Herald Tribune* chose to present Jared Kushner with the Abraham Shield Award 2026.

The award does not recognize one

agreement, one photograph or one moment at the White House. It honors a body of work pursued with extraordinary consistency from 2017 until today. Through political transitions, wars, personal attacks and repeated declarations that peace was dead, Jared remained committed to one essential idea: the peoples of the Middle East are not condemned to permanent conflict.

His achievement began with an act of intellectual courage.

For decades, much of Washington’s foreign-policy establishment approached peace through doctrine. Negotiations began with final borders, historical claims, ideological formulas and comprehensive political settlements. Economic cooperation was treated as secondary—a benefit that might follow once every political disagreement had been resolved.

To speak of transactions or common interests was sometimes regarded as intellectually unsophisticated, even morally suspect, as though practical benefit somehow diminished the dignity of peace.

Kushner challenged that assumption.

He did not invent the connection between commerce and peace. His innovation was to place economic cooperation, human exchange and shared prosperity at the center of the diplomatic architecture—not to postpone them until after a final political settlement.

He understood that trade is not merely the movement of goods and capital. Business creates habits of trust. A contract requires reliability. Investment requires confidence in a shared future. A joint enterprise turns a distant stranger into a partner whose success becomes connected to one’s own.

Over time, these relationships move beyond companies. They reach communities, universities, families and future generations. Common interests can become shared achievements, and shared achievements can produce human understanding.

This was more than a negotiating technique. It represented a different way of constructing peace.

In Kushner’s vision, peace would not remain an agreement signed by governments and protected by protocol. It would become a lived relationship sustained by flights, investment, technology, tourism, education and personal encounters.

Prosperity would not simply be the reward for peace. It would become one of peace’s foundations.

At first, this approach shocked many observers. It was dismissed as “transactional,” as though transactions were inherently unworthy. But there is dignity in two people freely choosing to build something together. There is moral value in creating opportunity where ideology has produced only sacrifice. And there is wisdom in giving peace a constituency—not only among diplomats, but among entrepreneurs, students,

families and young people who can experience its benefits directly.

The approach worked.

The Abraham Accords changed what the region believed was possible. They demonstrated that Arab nations and Israel could move beyond inherited paralysis and build open relationships based on recognition, security, opportunity and mutual respect.

They replaced an abstract promise of eventual reconciliation with the concrete experience of cooperation.

The world has changed since 2017, and so has our understanding of peace. We now see more clearly that peace cannot survive on signatures alone. It must create movement, opportunity and hope. It must improve lives. It must give people a personal stake in one another’s stability and success.

This is the transformation Jared Kushner helped set in motion.

The Abraham Shield Award 2026 therefore recognizes more than a diplomatic achievement. It honors persistence: the patience to carry an unconventional idea through ridicule and resistance; the discipline to translate vision into detailed agreements; and the courage to continue when violence tempted the world to abandon the possibility of coexistence.

But no individual can deliver peace alone, and Jared has never claimed to be a savior.

He has done his part—and more. He opened a door that conventional diplomacy had left closed. He built a framework and demonstrated that another future was possible.

The responsibility now belongs to the leaders of the region.

They must place the interests of their countries above their personal or political calculations. They must decide whether they will remain captive to slogans that have failed

their people or choose security, dignity and prosperity.

They cannot ask one American envoy, one administration or one set of agreements to substitute for their own courage. Peace requires partners willing to defend it, expand it and translate it into everyday life.

This is especially true after the tragedy of October 7 and the devastating war that followed.

In such a time, pessimism can masquerade as realism. It is easy to declare that hatred has won, that trust has become impossible and that those who tried to build bridges were naïve. It is much harder to insist that the answer to catastrophe cannot be the permanent surrender of the future.

Jared refuses that surrender.

Perhaps the source of his resilience lies partly in the personal history that shaped him. His family knew persecution, survival, hardship and rebuilding. As a young man, he found himself carrying responsibilities that would have overwhelmed many people twice his age.

Life taught him early that circumstances can change without warning, that public judgment can be merciless and that a family name can become a burden before it becomes a legacy.

He did not allow that chapter to define the limits of his life. He worked. He built. He endured.

I believe the experience gave him something more valuable than hardness: an instinct for renewal. That may help explain why he looks at the Middle East differently.

Where others see peoples permanently imprisoned by the past, he sees societies capable of beginning again. Where others see an immovable wall, he searches for the first door. Where others speak only of managing conflict, he continues to imagine peace.

During our meeting, I sensed that this cause now transcends politics for him. It is not merely a chapter from his years in government. It has become personal—a passion grounded in the conviction that another generation must not be sacrificed to the failures of those that came before it.

That is the man we wanted the Abraham Shield Award 2026 to recognize.

Not a man without critics. Not a man claiming perfection. And not a man asking to be celebrated as the solitary author of history.

Rather, a builder who challenged an exhausted orthodoxy; a negotiator who understood the human power of shared prosperity; and an optimist who, after every setback, returns to the work.

A shield is an ancient symbol of protection. The Abraham Shield represents the defense of a fragile but revolutionary idea: that the children of Abraham can secure their future not through endless confrontation, but through courage, common purpose and peace.

In presenting the Abraham Shield Award 2026 to Jared Kushner, we honor what he has already built.

We also recognize the promise he continues to keep.

He will not give up. Neither should we. *

AHMED CHARAI

Publisher

Ahmed Charai is the Chairman and CEO of World Herald Tribune, Inc., and the publisher of *the Jerusalem Strategic Tribune*, TV Abraham, and Radio Abraham. He serves on the boards of several prominent institutions, including the Atlantic Council, the Center for the National Interest, the Foreign Policy Research Institute, and the International Crisis Group. He is also an International Councilor and a member of the Advisory Board at the Center for Strategic and International Studies.

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PUTIN IS HOLDING FIRM, BUT THE WITKOFF AND KUSHNER SHOULD KEEP TRYING

U.S. President Trump meets Ukrainian President Zelenskiy in Florida. Ukrainian President Volodymyr Zelenskiy looks at U.S. President Donald Trump as Trump reacts to questions from the media upon Zelenskiy's arrival for meetings at Trump's Mar-a-Lago club in Palm Beach, Florida, U.S., December 28, 2025. Reuters/Jonathan Ernst TPX IMAGES OF THE DAY. Credit: Reuters



by Dov S. Zakheim

Steve Witkoff and Jared Kushner, President Trump’s go-to negotiators, recently returned from another round of discussions that aim to bring an end to the Russo-Ukrainian War. It was Witkoff’s eleventh meeting with Vladimir Putin and his first with Ukrainian President Volodymyr Zelensky. It likewise was Kushner’s first trip to Kyiv.

Both Putin and Zelensky characterized their respective meetings with the American duo in polite terms. Putin called the talks “highly useful” while Yuri Ushakov, his exceedingly shrewd senior national security advisor and former ambassador to Washington, stated that Witkoff and Kushner “outlined a number of ideas regarding possible avenues for a settlement” without detailing what those ideas might be. For his part, Zelensky claimed that he and the two American envoys discussed “all possibilities” including several genuinely new ideas.

Nevertheless, all that both leaders agreed to was nothing more than to resume the talks that had stalled six months ago, with the United States serving once again as a go-between. When that resumption might take place, and under what conditions, however, has yet to be determined.

In any event, whenever the talks finally do commence, they may prove to be of no great significance. That at least is the view of the current and former top Finnish officials and experts whom I met during a trip to Helsinki shortly after Witkoff and Kushner returned home from their talks.

Finland’s leaders have long been especially sensitive to developments in Moscow. Once a Russian grand duchy, after achieving its independence in 1917 the country fought two wars in the twentieth century against the Soviet Union. Because Finland was allied to Nazi Germany in World War II, Joseph Stalin considered, but then decided against, seizing the country as he had the Baltic states in 1940. Instead, he forced Helsinki to accept an uneasy and nearly subservient neutrality in the war’s aftermath that lasted for decades. Finland only truly gained unfettered freedom of action when the Soviet Union collapsed.

As a result of its having joined NATO in April 2023, Finland’s roughly eight-hundred-mile border with Russia is now the alliance’s longest. It has been the victim of Russian hybrid warfare. Not surprisingly, Helsinki brings a special perspective when analyzing developments in the Kremlin.

It is the unanimous opinion of all with whom I met that Putin will not compromise with Ukraine. They are convinced that he will continue to fight because he believes that he will win the war. Several added a second reason: he

will continue to fight because he believes that Washington ultimately will force Zelensky to give up at least Luhansk and Donetsk, the two eastern Ukrainian oblasts much —though not all—of which Russia has occupied since 2014. As one of Finland’s former leaders pointed out to me, after consistently denying that Russian forces had invaded the two oblasts, on one occasion he inadvertently blurted out to that person that “his” troops took them. And, as Putin has made clear regarding Crimea, which Moscow has illegally annexed, he will not give back what he has taken.

Moreover, Putin remains unmoved by the staggering losses his forces are suffering, now amounting to about 40,000 killed or wounded monthly. Nor does he appear especially responsive to Russia’s increasingly dire economic situation.

Like many European officials who have dealt with Putin, the Finns who know him personally note that he combines an idealistic obsession with restoring the Great Russia of the Czars with the ruthless methods of the KGB, his former employers. One former senior leader told me that Putin pores over old Russian maps to determine where the Empire gained territory and where it lost it. Another former official who had served as Finland’s ambassador to Moscow recalled that in order to have personal access to the maps as well as Czarist treaties, Putin moved the national archives from their home in the Ministry of Culture to the presidential office.

A top former official who also has met Putin several times noted that Putin, like many Russians, has a strong sense of grievance against the West in general and the United States in particular. Since he is incapable of finding fault with his own policies, he truly believes that despite assurances that it would not interfere in Ukrainian politics, it was the West, led by Washington, that prompted the February 2014 Maidan Square upheavals. Putin likewise resents America’s disrespect of Russia in the aftermath of the Cold War, especially Barack Obama’s dismissive remark that Russia merely

was merely “a regional power that is threatening some of its immediate neighbors not out of strength but out of weakness.”

Because they are convinced that Putin will not yield at all, the Finns with whom I met are uncertain how he might respond if Ukraine not only continues to fight against what Kyiv rightly considers to be an existential threat, but further expands its attacks on Russian infrastructure and military targets. All agree that Russia will retaliate at least in kind and will ramp up the nature of its attacks on Ukrainian targets. They are deeply concerned, however, about the possibility that if he sees himself cornered, Putin will resort to a tactical nuclear attack on Ukraine. Several of my interlocutors asked if, and equally important how, Washington would respond if Putin were to unleash such an attack on Ukrainian territory. It is a question that weighs heavily in Helsinki.

Putin’s obstinacy should not prevent Trump’s negotiators from working to bring the war to an end. It is always a mistake to postulate that a given situation can never change. After all, no one predicted the imminent fall of the Berlin Wall; the dissolution of the Warsaw Pact; and the collapse of the Soviet Union. But in the meantime, at least according to the Finns, the five-year war could on for quite some time, certainly into a sixth year and perhaps even a seventh. *

DOV S. ZAKHEIM

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TO SECURE PEACE IN UKRAINE, TRUMP MUST PRESSURE PUTIN



Credit: Reuters/Jeenah Moon



By Melinda Haring and Jacob Heilbrunn

After seeing Kyiv firsthand, Jared Kushner and Steve Witkoff have an opportunity to reshape Washington's approach—but a durable settlement will require confronting the Kremlin's ambitions and bringing Vladimir Putin to the negotiating table.

When Jared Kushner and Steve Witkoff traveled to Moscow and Kyiv by train in early September, they sought to bring peace to Ukraine. Critics of the trip quickly asserted that the two U.S. special envoys had not produced anything of substance, but Ukrainian President Volodymyr Zelenskyy struck a more conciliatory tone. He suggested that the Trump administration was in fact playing a constructive role in pushing for a de-escalation of the fighting during the winter that might lead to a more durable peace.

Indeed, it now appears that the Trump administration will intensify its efforts to arrive at an agreement by assigning a more prominent role to CIA Director John Ratcliffe who has reportedly been pushing for a three-way Trump-Putin-Zelenskyy summit meeting.

The detractors of the visit missed another point: Kushner and Witkoff finally saw Kyiv for themselves. That is no small matter. After Witkoff's repeated trips to Moscow—eight

in all—Russian president Vladimir Putin's narratives and talking points have influenced the US negotiating team. Now Kyiv's charm offensive was on full display: Kushner and Witkoff dined on Crimean Tatar food during their journey, enjoying their meals on placemats that proclaimed "Crimea is Ukraine"; they were met with a sign proclaiming "PEACE EXPRESS" when they arrived in Kyiv; and they were warmly greeted by President Zelenskyy at St. Sophia's Cathedral, another dig at Putin's bogus narrative that Ukraine is not an independent and sovereign nation. St. Sophia's Cathedral, a UNESCO World Heritage Site, was first built in the eleventh century more than one hundred years before the city of Moscow was founded.

Meanwhile, in Moscow Putin blustered about the "Kyiv regime" -- code for his claim that Ukraine consists of a bunch of unrepentant Nazis, even though President Zelenskyy is himself proudly Jewish and the great grandson of a Holocaust survivor. A day later, a Ukrainian negotiator presented Witkoff and Kushner with "Kyiv regime" T-shirts as a joke. If nothing else, Kyiv won the optics volley.

Alas, the war isn't just one of optics and it's not going anywhere. So what are the current impediments to a genuine peace settlement—and what course should the Trump administration pursue to help create one?

There can be no gainsaying that the main obstacle to an end to hostilities remains Putin's irredentist aspirations in Ukraine. It is

important to remember that Russia initiated the war. Ever since it invaded Ukraine in February 2022, Moscow has sought not merely conquest of territory but to extirpate Ukrainian nationhood. Its methods include torturing and murdering priests, kidnapping thousands of children, and destroying schools and textbooks. In this regard, Putin has returned to a traditional Russian imperial textbook, which views Ukraine not as an independent and sovereign nation, but a colony whose population and resources are to be exploited on Moscow's behalf. In a February 21, 2022 speech, for example, Putin made clear his disdain for the country, stating that "modern Ukraine was wholly and fully created by Bolshevik, communist Russia." Such piffle may play well to a motley crew of Russian nationalists, but it does not provide the basis for any substantive negotiations.

Putin's willful invasion has prompted successive American administrations and western Europe to support Ukraine financially and militarily. The Trump administration has continued delivery of billions in weaponry under the provisions of the Ukraine Security Assistance Initiative. Then there is the European Union. Earlier this year it approved a two-year \$106 billion package for Ukraine. Now it's grappling with a fresh request to fill a sudden \$27 billion gap in the Ukrainian defense budget. With populist political parties on the rise in Europe, the request comes at an inopportune moment.

Ukrainians can continue to hold off the Russians indefinitely so long as technological innovation continues apace. Again and again, Ukrainian ingenuity has ensured that its military remains a step ahead of Russia's. But the upcoming winter will present a variety of hardships. For one thing, Russia is preparing a triple whammy: jet-powered drones that whizz by Ukraine's air defenses without any known remedy, cheap mid-range rockets and more ballistic rockets. Kyiv may have committed a tactical error this summer by repeatedly striking Wildberries, the biggest Russian online retailer.

Putin retaliated by targeting Odesa, where vital Ukrainian grain storage and loading facilities are located.

As a result, Ukraine's economy is suffering. The country relies on support from the West to fund everything from government employees to teachers. Unfortunately, an \$8.1 billion package approved this past February by the International Monetary Fund to stabilize the economy and promote structural reforms will fall far short of what's needed. On the plus side, meteorologists are projecting that a "Super El Niño" could ensure a balmy winter than the previous one, which might help mitigate the effects of Russian targeting of Ukrainian energy facilities.

A lack of western interceptors, however, has rendered Ukraine vulnerable to attacks from drones and missiles. Washington deserves some of the blame. Certainly Russia's jet-powered drones and constant reign of terror that it unveiled at the beginning of September has driven remarkable innovation, prompting Ukrainian engineers to work around the clock to develop interceptors that can destroy the latest Russian drones, many of them capable of reaching speeds of up to 300 miles per hour--two to three times faster than previous versions. However, there will be at least a two-month gap before new interceptors can come online, which means that December and January will be extraordinarily daunting for ordinary Ukrainians.

Still, Moscow has real reason to seek an accommodation with Kyiv, at least on paper. Its promised 72-hour war has turned into a strategic morass. This summer Ukraine struck every major Russian oil and gas facility, forcing Moscow to stop exporting diesel fuel. The economy is faltering—the Russian economic ministry has projected a growth forecast of just 0.4 percent for 2026. Lines have become routine at gas stations. Nor is the war going well. Russia has made no real gains on the front lines during the past year and Ukrainian forces have recently forced it to retreat in northeastern Ukraine near the town of Lyman. Its military leadership

is pleading for an additional 800,000 recruits. After Russia's September parliamentary elections, Putin is widely expected to authorize a fresh mobilization order. But Putin's calculus isn't a balance sheet. The Russian president bet the house on his "special military operation" in Ukraine and his initial aims remain unchanged.

How can the Trump administration promote peace? First, talk about the war accurately. Kushner has at times described the war as a business conflict, but the true sources of the conflict rest elsewhere.

Professor Eugene Finkel's *Intent to Destroy*, which examines the historical origins of the conflict, is a good place to start. Second, words matter. Putin is not a businessman; he's a long-time KGB officer and he knows exactly what he's doing as he flatters the team and offers sweetener after sweetener in the form of potential business deals. But Russia's record in dealing with western businesses does not inspire much confidence. It has either fleeced or outright expropriated them through legal shenanigans and threats of violence. ExxonMobil, Shell and BP have all written off billion dollar deals that went south.

Third, Putin, not Zelenskyy, is the problem. Putin began the war. Putin is terrorizing Ukrainian citizens. And Putin is threatening Europe.

Put bluntly, this Russian war criminal must be stopped. The Trump administration can leverage American power to apply real pressure against Putin. A sound move would be to give Zelenskyy the right to license Patriot missile interceptors. Then permit Ukraine to employ Starlink in Russia. Finally, open the full suite of American intelligence and provide Kyiv with real-time intelligence. Peace is possible but it starts by recognizing that the Kremlin, for all its bravado, can be cornered. The time has come to isolate Putin and force him to the negotiating table. *

MELINDA HARING

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THE BEST DEAL AMERICA CAN MAKE IN UKRAINE





By Andrey Stavnitser

In 1994, my father began building TIS, a private port near Odesa. Today, I run it together with my brother and our founding partners. Ukraine's ports are among Russia's primary targets—and they are also my family's life's work.

Since the beginning of the full-scale invasion, I have also been a co-founder of Superhumans, Ukraine's leading war-trauma center, which provides free prosthetics, reconstructive surgery, rehabilitation, and psychological support to civilians and service members injured in the war.

Every day I see the war from two sides: at Superhumans, what it does to people—their bodies, minds, and lives; at the port, what it does to business and the economy—infrastructure, jobs, investment, and Ukraine's links to the world.

I do not usually write opinion columns, but I am told that Americans too rarely hear directly from Ukrainian businessmen, so I am making an exception. I would like to explain what it means to run a business under constant attack, and why business can help lay the foundations for a just peace.

I am grateful to the members of the American negotiating team for coming to Ukraine in person and seeing that the image of our country created by Russian propaganda bears no relation to reality. Air-raid sirens sound constantly, yet offices remain open, government institutions continue to function, public transport keeps running, and children still go to school.

This is who we are. We do not wait for charity, and we do not ask the world to abandon its own interests in order to save us. We act, adapt, and find solutions—even, and especially when we get very little sleep at night.

The sea is the foundation of Ukraine's economy, and we compete with Russia for exports to global markets. That is why Russia blockaded our ports before it began bombing our cities. Shipping was later reopened by our military alone—diplomacy had been sabotaged. Now, for the second time in five years, our ports are once again de facto closed. We are bombed every day, and our team spends more time in shelters than outside them.

This is a global issue. If this blockade persists, up to 40 million tons of grain that Ukraine would normally export could also be stranded. Much of it is feed grain, particularly corn, so consumers around the world, including in the United States, will soon feel the consequences in the price of meat.

The situation on the Black Sea sounds like a catastrophe. And yet here am I. My partners are here, too. We are not discussing selling the business or moving our assets abroad. We are only asking ourselves how to continue with less risk.

This is how all of Ukraine operates today. In recent weeks, many of the country's largest companies have come under serious attack. None is considering shutting down or leaving its industry. Instead, they are looking for new resources.

When we were first forced to halt operations from February to August 2022 during the first year of the war, we continued to meet our obligations to the EBRD and IFC, whose financing had helped us build the Neptune grain terminal in partnership with Cargill. Then, in 2026—when no serious person could still regard the war in Ukraine as a short-lived disruption that would soon be over—we attracted MSC, the world's largest container shipping company, as an investor in one of our terminals.

Investment during a war is possible. Companies operating in a country at war can meet their obligations. Ukraine is not a country waiting to be saved. It is a country that knows how to work, understands that its economy must remain functional, and is capable of being a reliable partner under the most difficult circumstances.

More than that, investment in Ukraine today can become one of the shields that make us stronger. Every serious international investment increases our economic resilience, strengthens our ties with the world, and creates another interest that Russia must take into account.

We are approaching the fifth anniversary of the full-scale invasion. Today, no one is under any illusion that appeals to reason will make Russia stop. Russia respects strength. And Washington possesses unquestionable power—power that Russia cannot ignore and must regard as a threat to its ambitions.

The greater America's presence in the Ukrainian economy, the greater our combined weight. Every American company, investment, asset, and long-term commercial interest in

Ukraine strengthens the relationship between our countries and raises the price Russia must pay for attacking us.

I know from personal experience what American support can achieve. Superhumans is the only Ukrainian nonprofit organization to have secured political-risk insurance from the U.S. International Development Finance Corporation during the full-scale war. I am profoundly grateful for this trust, and I firmly believe that we should not remain unique.

But individual success stories do not yet constitute an investment system. Political-risk insurance and guarantees for strategic projects can help turn what remains exceptional into a replicable model.

The U.S.-Ukraine Reconstruction Investment Fund provides a foundation for a broader partnership. But the opportunities extend far beyond mineral extraction. American companies can invest in energy, ports, logistics, agricultural processing, defense technology, manufacturing, healthcare, housing, and reconstruction.

We can offer America the opportunity to turn the commitments it has already made into a long-term strategic and economic asset. President Trump is right: America should profit from having believed in Ukraine before others did.

Ukraine, meanwhile, will continue developing drone technologies, strengthening its military capabilities, and learning to defend itself more effectively. We will continue building our own strength. When Ukraine's growing military capabilities are combined with America's economic, political, and strategic power, together we gain enough weight to push the aggressor towards a just peace.

A just peace must provide for long-term air defense and secure navigation in the Black Sea; predetermined and automatically applied consequences for renewed aggression; and the use of frozen Russian assets to finance reconstruction. The country responsible for the destruction must bear the cost of rebuilding.

Ukraine, in turn, will fulfill its side of the bargain by ensuring transparent governance,



independent audits, open competition, protection of private property, predictable regulation, and genuine accountability for corruption.

The best peace agreements are not those that produce a beautiful photograph on the day they are signed. They are the agreements for which no one will have to apologize ten years later.

Do not give Russia a respite. Invest in a Ukraine that knows how to build under fire—and help us secure a peace Russia cannot afford to break. *

ANDREY STAVNITSKY

Andrey Stavnitsky is a Ukrainian businessman, co-owner and CEO of TIS. Stavnitsky is also the co-owner of Neptune Grain Terminal, a P&O Maritime Ukraine towage operator and a founding partner of SD Capital Investment Company. He is honorary consul of Austria in Odesa. He is the Founder of Superhumans Center of War Trauma.



UKRAINE IS THE WORLD'S DEFENSE INNOVATION LAB



by Daniel F. Runde, David Brown

The United States risks falling behind in the most important military learning environment of our time: Ukraine's drone-interceptor battlefield. Ukrainian forces are refining AI-enabled targeting, autonomous interception, electronic warfare resilience, and battlefield tactics, techniques, and procedures at a pace unmatched anywhere else in the world. While the United States continues to learn from Ukraine through intelligence sharing, after-action reporting, and close partner engagement, it lacks the routine, on-the-ground exposure that produces the fastest operational learning. Meanwhile, America's strategic competitors—including China, Iran, North Korea, and Russia—are aggressively collecting and incorporating lessons from Ukraine into their own military modernization efforts.

This gap is dangerous—and entirely fixable.

The Department of Defense should explore mechanisms for expanding military-to-military observation and technical exchanges while also broadening opportunities for qualified American defense-industry teams to work

alongside Ukrainian counterparts under carefully controlled, non-combat conditions. No American personnel would participate in combat. Their mission would be to observe, learn, test, maintain, and integrate technology alongside the world's most experienced drone-interceptor operators.

This is particularly important because the United States cannot realistically replicate Ukraine's operating environment at home. FAA regulations, spectrum restrictions, safety requirements, and the absence of sustained high-intensity drone warfare make realistic testing difficult. Ukraine has become the world's premier laboratory for autonomous systems operating under combat conditions. American engineers and military professionals should have greater opportunities to learn directly from that experience to strengthen the capabilities of U.S. warfighters.

President Trump has consistently argued that American foreign policy should deliver measurable benefits for the American people. Strengthening the U.S. defense industrial base, accelerating American innovation, and ensuring American companies—not strategic competitors like China—lead the next generation of autonomous warfare fits squarely within that vision.

Expanding opportunities for American defense contractors to operate inside Ukraine is not mission creep. It is strategic self-interest.

It strengthens American companies, improves military readiness, and ensures that American engineers—not America's adversaries—are the ones learning from the fastest-moving defense technology revolution in decades.

Late in the previous administration, the United States took an important first step by permitting limited contractor activity inside Ukraine to maintain and sustain U.S.-provided military equipment. The Trump administration now has an opportunity to build on that foundation by establishing a more durable framework that enables qualified American companies to provide maintenance, technical support, engineering collaboration, and technology integration under strict security guidelines.

This is not about expanding America's military role in the conflict.

It is about expanding America's competitive advantage.

Ukraine has become the world's foremost laboratory for autonomous systems, AI-enabled targeting, electronic warfare, battlefield software, rapid manufacturing, and counter-drone operations. Technologies that traditionally required years of development are evolving in months. American companies need greater opportunities to observe, adapt, and incorporate these lessons into next-generation U.S. systems. If the United States fails to remain closely connected to this innovation ecosystem, our competitors will not.

This is fundamentally an America First economic opportunity. The future of America's defense industrial base will depend not only on traditional weapons platforms but increasingly on software, autonomy, artificial intelligence, and advanced drone systems. American firms have historically maintained their competitive advantage by learning faster than their competitors. Remaining connected to the world's fastest-moving defense innovation

ecosystem helps preserve that edge while creating new opportunities for American investment, manufacturing, and exports.

The strategic benefits are substantial:

- * Accelerate innovation across America's defense industrial base.
- * Improve drone-interceptor and counter-UAS capabilities through real-world operational insights.
- * Strengthen U.S. manufacturing and defense supply chains.
- * Increase the survivability and effectiveness of American warfighters.
- * Preserve America's technological edge over China, Russia, Iran, and North Korea.

Every lesson learned in Ukraine ultimately benefits the American taxpayer. Better drone defenses reduce future procurement costs, shorten development timelines, strengthen domestic manufacturing, and help ensure that American service members enter future conflicts equipped with the best available technology. The goal is not simply to help Ukraine win today's war. It is to help America deter tomorrow's wars.

Greater collaboration between American and Ukrainian defense industries would also accelerate technology transfer, strengthen research partnerships, improve supply-chain resilience, and expose U.S. engineers to operational innovations that cannot be replicated in laboratories or test ranges. Those lessons will ultimately strengthen America's own military capabilities while creating commercial opportunities for American companies that are positioned to lead the next generation of defense technology.

President Trump has consistently emphasized that economic strength and national security are inseparable. Few sectors illustrate that relationship more clearly than the defense industrial base. Policies that strengthen American defense companies strengthen America itself. Expanding carefully managed

opportunities for qualified American defense contractors, engineers, and technical experts to operate inside Ukraine should therefore be viewed not primarily as assistance to Ukraine, but as an investment in America's long-term military superiority, technological leadership, and economic competitiveness.

As the administration continues to reshape America's foreign policy around tangible national interests, expanding this framework would represent a natural next step. It would strengthen American industry, deepen U.S. technological leadership, provide our military with invaluable operational insights, and ensure that the United States—not its strategic competitors—captures the benefits of the most significant defense innovation revolution of the twenty-first century.

This is the next logical step in an America First strategy.

Strengthen American business.

Reinforce American technological leadership.

Increase the survivability and effectiveness of American warfighters.

Ensure that the United States leads the future of warfare—not merely watches it. *



Credit: Reuters

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President Donald J. Trump in the Oval Office with Sebastian Gorka and Nancy Dahdouh following the signing of the executive order targeting certain Muslim Brotherhood chapters for terrorist designation.



by Ahmed Charai

Words can kill. Washington knows that radical narratives can prepare the ground for radical action. But ideology alone does not sustain organizations, build international networks or finance operations. They need money. And recent actions by the U.S. government raise a question that deserves much greater attention: How extensive are the transnational financial networks connecting Muslim Brotherhood affiliates, front organizations and designated terrorist organizations such as Hamas?

This is no longer a theoretical question. The evidence is beginning to emerge. In June, the Justice Department charged a San Diego resident with allegedly raising approximately \$600,000 through purported humanitarian

campaigns and diverting part of those funds toward Hamas. The allegations remain to be proven in court. In July, the U.S. Treasury said it had exposed a “multi-layered” structure in which Muslim Brotherhood affiliates and Hamas-directed front organizations operated transnational fundraising channels, using charitable facades and underground banking networks to move and disguise funds across jurisdictions. Then, on September 1, the Justice Department announced that the FBI had seized more than \$560,000 in cryptocurrency intended for Hamas while disrupting fundraising and recruitment infrastructure.

THESE CASES LEAD TO A FUNDAMENTAL QUESTION: WHAT HAVE WE NOT YET FOUND?

The Trump administration has already moved from debate to action, designating specific Muslim Brotherhood branches and

targeting financial networks that U.S. authorities say connect Brotherhood affiliates with Hamas. But designation should not be the end of the strategy. It should be the beginning.

At the National Security Council, Sebastian Gorka, Deputy Assistant to the President and Senior Director for Counterterrorism, and Nancy Dahdouh, Director for Counterterrorism, Global Jihadi Movement–Sunni Threats, have worked directly on this challenge. They know the subject, have helped make the case inside the administration, and have contributed to moving the issue from debate to concrete action.

The challenge now is to build on the progress already achieved and develop a coordinated strategy capable of identifying and disrupting the broader financial architecture behind these transnational networks. Treasury, State Department, Justice, the FBI and the intelligence community already possess formidable authorities and capabilities. The NSC can play an essential role in ensuring that these capabilities become part of a coherent strategy against networks that recognize neither bureaucratic boundaries nor national borders.

If the networks are transnational, the response must also be transnational. Washington should deepen cooperation with trusted governments, intelligence services and financial authorities in Europe, the Middle East, Africa and Asia. The objective is straightforward: follow the money. Who raises it? Who receives it? Which charities transfer it? Which businesses and financial intermediaries move it? Where are the common directors, donors and beneficiaries? Where does the money cross jurisdictions? Most importantly, where does it ultimately end?

The same questions deserve to be asked inside the United States. America’s charitable and nonprofit system provides extraordinary freedom to raise money for religious, humanitarian and social purposes. Federal authorities should examine, where evidence warrants it, whether anyone is exploiting those protections, nonprofit status or charitable fundraising to conceal financial flows that

ultimately benefit designated terrorist organizations. The issue is not religion. The issue is conduct, money and evidence.

Treasury has already provided reasons to look deeper. It has described charitable facades, underground financial networks, intermediaries and cross-border structures associated with Hamas and Muslim Brotherhood affiliates. The next phase therefore should not simply be another list of designations. It should be an effort to map the architecture.

That means identifying organizations that may appear unrelated but share financial intermediaries, directors, donors, beneficiaries or foreign partners. It means examining the ultimate destination of funds rather than stopping at their declared humanitarian purpose. And it means connecting information held by different American agencies with intelligence and financial information available to trusted foreign governments.

This is where American power is unique. The international role of the dollar, the reach of the American financial system, Treasury’s sanctions authorities, American intelligence capabilities and Washington’s relationships with governments around the world provide the United States with extraordinary instruments to expose illicit financial networks wherever the necessary legal jurisdiction exists.

There may be organizations and networks today that remain legal, dispersed and apparently disconnected until financial relationships, common intermediaries or organizational connections reveal a larger architecture. We should not assume those connections exist. But neither should we wait for another attack to discover them. We should find out whether they exist through methodical investigation and evidence.

October 7 demonstrated again the consequences of underestimating networks, intentions and capabilities. Washington now has an opportunity to move upstream. **President Trump should give Gorka, Dahdouh and the broader counterterrorism team a**

larger mandate to help coordinate this effort across the U.S. government and with America's partners abroad.

The principle is not complicated. Words matter. Networks matter. But organizations cannot survive without resources.

Follow the money. Map the networks. Establish the evidence. Expose illicit finance. Cut the financial lifelines. That is where the next phase of the fight should begin. *

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Pakistani Navy soldiers march past the Nasr solid fuelled tactical ballistic missile system during Pakistan Day military parade in Islamabad, Pakistan March 23, 2019. Credit: Reuters/Akhtar Soomro

WHEN NUCLEAR USE BECOMES THINKABLE: LESSONS FROM SOUTH ASIA AND THE MIDDLE EAST



by Dr. Zoë I. Levornik

The most consequential change in the nuclear order may be taking place without a weapon being detonated. Nuclear threats have become more frequent, while low-yield or “tactical” weapons are increasingly discussed as instruments for managing conventional conflicts. Intended to strengthen deterrence, such references are nevertheless changing how nuclear use is imagined.

For more than eighty years, the nuclear taboo has defined these weapons as fundamentally different from other instruments of war. Their non-use since Hiroshima and Nagasaki reflects not only fear of retaliation but also a powerful normative judgment: crossing the nuclear threshold would constitute an exceptional political and moral rupture. Yet a taboo can weaken before it is openly violated. The process begins when language divides nuclear weapons into supposedly distinct categories, strategic and tactical, catastrophic and limited, unthinkable and potentially usable.

This shift is especially dangerous in regional

conflicts, where recurring confrontations create demand for nuclear options that appear credible without appearing suicidal. South Asia shows how tactical weapons can enter an established deterrence relationship. In the Middle East, by contrast, the rules of a possible future nuclear order are being shaped before a reciprocal balance has emerged. Together, they show how the distance between deterrence and employment narrows once limited use becomes thinkable.

THE ILLUSION OF THE TACTICAL NUCLEAR WEAPON

The term “tactical nuclear weapon” suggests a weapon designed for a limited military purpose: striking forces, command centers or other battlefield targets rather than cities. Such weapons generally have shorter ranges or lower yields than strategic systems, although no universally accepted definition separates the categories. More importantly, the label describes an intended mission, not the consequences of use.

Changes in the rhetoric and doctrines of the major powers have reinforced this distinction. Russia has most explicitly linked non-strategic

nuclear weapons to conventional conflict: President Vladimir Putin has repeatedly invoked possible nuclear use, Moscow conducted publicly announced non-strategic nuclear exercises in 2024, and its revised doctrine broadened the circumstances in which nuclear weapons might be considered. The United States has used less overtly threatening language, but its 2018 Nuclear Posture Review called for flexible low-yield options to deter regional aggression, leading to deployment of the W76-2 warhead. Both governments present these policies as strengthening deterrence, yet they also portray limited nuclear employment as a credible response within a conventional conflict, blurring the line between deterring nuclear war and preparing to fight one.

A lower-yield weapon can still cause mass casualties, radiation exposure and fallout beyond its target. It would also have political and strategic effects far greater than even the most destructive conventional strike. The state under attack could not know whether the explosion was an isolated act or the start of a broader campaign, while the attacker could not control its adversary’s interpretation or response.

Terms such as “limited,” “low-yield” and “battlefield” nevertheless imply that the threshold can be crossed in a controlled manner to halt an offensive, demonstrate resolve or compel negotiations without further escalation. This is the central illusion. A weapon may be tactical in target, range or delivery system, but no nuclear detonation can be guaranteed to remain tactical in consequence. After first use, escalation would depend on fear, incomplete information and decisions made under extreme pressure. The language of limited nuclear war does not make nuclear use safer; it makes first use easier to contemplate.

This normalization has consequences beyond great-power rivalry. It supplies regional powers facing territorial disputes, recurring violence and military asymmetries with language and strategic legitimacy for limited first use. Yet regional crises often involve shorter warning times, weaker communication and fewer mechanisms for

controlling escalation. South Asia shows how this logic can enter an existing nuclear rivalry; the Middle East shows how it may shape a future nuclear order before such a balance exists.

SOUTH ASIA: THE DOCTRINAL NORMALIZATION OF LIMITED NUCLEAR USE

India and Pakistan have experienced repeated military crises since their 1998 nuclear tests while developing sharply different approaches to conventional and nuclear conflict. Pakistan’s doctrine of “full-spectrum deterrence” is designed partly to compensate for India’s conventional military superiority. It includes strategic, operational and tactical capabilities intended to deter attacks at multiple levels. The short-range, nuclear-capable Nasr missile is especially significant because it threatens Indian forces operating inside Pakistani territory, denying India a supposedly safe space for limited conventional operations below the nuclear threshold.

India officially maintains a no-first-use policy, but its doctrine threatens massive retaliation if nuclear weapons are used against Indian territory or forces. This produces a dangerous asymmetry: Pakistan seeks to make limited first use credible, while India seeks to make any first use prohibitively costly. Both postures are meant to deter, yet together they leave unresolved whether a tactical Pakistani strike could remain limited or would provoke a far larger Indian response.

The brief but severe India–Pakistan conflict in May 2025 demonstrated both the resilience and fragility of this arrangement. The sides exchanged missile and drone strikes, including attacks on military facilities, yet officials later stated that there had been no direct nuclear signaling and that the confrontation remained conventional. This restraint matters: escalation was not inevitable even during an intense crisis.

Still, every operation occurred against the background of Pakistan’s tactical posture and India’s promised retaliation. Nuclear use had already been incorporated into the boundaries

within which both sides calculated risk. South Asia thus demonstrates a subtle form of normalization: nuclear weapons need not be brandished in every crisis once battlefield use is established in doctrine. The taboo remains formally intact, but one category of employment has become strategically imaginable.

THE MIDDLE EAST: NORMALIZATION BEFORE PROLIFERATION

The Middle East does not yet resemble South Asia. Israel maintains nuclear ambiguity, Iran has no declared nuclear weapons, and no regional dyad has developed competing nuclear doctrines. Yet nuclear considerations are moving closer to the center of conventional conflict before a reciprocal balance has emerged.

For decades, the regional debate focused on preventing proliferation: whether Iran sought a weapon and which diplomatic or economic measures could stop it. Military action against nuclear facilities remained a threatened last resort. Israeli and American strikes on Iran changed that relationship. Nuclear infrastructure became an active theater of war, linked to the wider confrontation over Tehran's missile forces and regional capabilities.

Iran continues officially to reject nuclear weapons, citing Supreme Leader Ali Khamenei's religious prohibition on their development and use. At the same time, Iranian officials and advisers have suggested that an existential threat could force the country to reconsider its nuclear doctrine. These statements do not amount to a declared decision to build a bomb, but they make acquisition, and eventually deterrence or use, appear conditional rather than categorically excluded.

This is not the doctrinal normalization visible in Pakistan. It is anticipatory normalization: political language constructing a possible future nuclear order. If Iran or another regional state acquires nuclear weapons, its doctrine will not be formulated in a vacuum. Today's references to existential threats, doctrinal change and attacks on nuclear infrastructure will shape what future

leaders regard as legitimate. The danger is that the region could enter a nuclear era with the threshold already weakened and limited use conceived as a response to conventional defeat or threats to regime survival.

TWO STAGES OF THE SAME NORMATIVE SHIFT

The comparison concerns different stages in the normalization of nuclear thinking, not equivalent capabilities. South Asia represents operational normalization: Pakistan has incorporated tactical weapons into its posture, while India has defined the potentially devastating consequences of their use. Nuclear employment now helps frame conventional conflict.

The Middle East represents anticipatory normalization. Nuclear use has not entered an acknowledged regional doctrine, but discourse about existential threats, strikes on nuclear infrastructure and doctrinal change is shaping future options. What South Asia has formalized in military planning, the Middle East is beginning to construct in political language.

In both cases, deterrence is the stated objective. Yet making a nuclear threat credible also makes use more conceivable. This is how the taboo fragments: not through wholesale acceptance of nuclear war, but through exceptional scenarios in which first use is presented as limited, defensive or necessary for survival. The prohibition remains universal in principle but increasingly conditional in practice.

PRESERVING THE NUCLEAR BOUNDARY

The nuclear taboo has not disappeared. No nuclear weapon has been used in war since 1945, and resistance remains powerful. But non-use is not permanence. The boundary weakens as states present exceptional categories of nuclear employment as limited or strategically necessary.

Preserving it requires rejecting the assumption that yield, range or target can determine the scale of a nuclear weapon's consequences. Nuclear-armed states should show greater restraint in

public signaling and avoid doctrines implying that escalation can be reliably controlled after first use. In regional conflicts, crisis communication and clear separation between conventional and nuclear command structures are essential to prevent conventional operations from being mistaken for preparations for nuclear attack.

South Asia shows that tactical weapons can make nuclear use part of the architecture of conventional war without deterrence visibly failing. The Middle East warns that this architecture can begin to form even before additional states acquire the bomb.

The taboo will not be preserved by declaring nuclear war unthinkable while planning supposedly manageable forms of it. Any first use must remain understood as an exceptional strategic rupture, regardless of yield or target. Nuclear weapons become usable in practice only after they become thinkable in language and doctrine. Preventing their use therefore begins by refusing to make it sound normal. *

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WHY DOES CHINA CLAIM TAIWAN?

Credit: Reuters



by Michael Mandelbaum

The most dangerous feature of international politics is the claim by China's communist government, dating from its formation in 1949, that the island of Taiwan, 100 miles from its southern coast, is a rebellious province rather than a sovereign state. In its view, therefore, Beijing has the right to use force to bring the island under its control. A Chinese attack on Taiwan, for which the communist regime has been preparing for years, could bring a military response from the United States and its Asian allies. The ensuing armed conflict between the two strongest military forces on the planet might engulf the entire world and involve the use of nuclear weapons. China's claim on Taiwan, in short, threatens to start World War III.

That claim is everywhere regarded as fixed and unshakeable, an immutable fact of international life from which the communist regime in Beijing will never retreat. Yet its status as the equivalent, for international politics, of the law of gravity in the natural world, is odd. It is neither well grounded historically

nor, especially from the standpoint of China's own interests, particularly sensible.

For most of mainland China's long history its government did not control Taiwan, and the current, Beijing-based, Communist regime has never done so. A Chinese annexation of the island might seem to conform to the widely accepted principle of national self-determination, but the people of Taiwan, ethnically Chinese though most of them are, do not wish to be part of the People's Republic of China and indeed are prepared to fight to avoid this fate. Moreover, not every national group dwells in a single sovereign state. Germans in Austria and Switzerland live contentedly outside the German Federal Republic. So it is with Chinese people themselves: not even China asserts that Singapore, with three-quarters of its inhabitants ethnically Chinese, must join the People's Republic.

Yet another reason for the oddity of the seemingly iron-clad character of the Chinese claim to Taiwan is that Beijing has no assurance of ever being able to make good on it. True, it is much larger and more populous than Taiwan and commands far more military resources. As a recent article in the journal *Foreign Affairs* by Dennis Blair, the former Commander-in-Chief of the American Pacific fleet, plausibly argues,

however, the Communist regime does not have the capacity to conquer the island at present and its prospects for achieving that capacity in the future are not necessarily bright. Of course, threatening to conquer it may bring some short-term benefits; but making a threat that is never carried out erodes the standing of the threatening party.

Finally, and perhaps most importantly, mainland China stands to gain a great deal by abandoning its claim and establishing formal diplomatic relations with Taiwan. This was not possible at the outset of the People's Republic in 1949, because Taiwan was occupied by the Communist Party's opponent in the Chinese Civil War, Chiang Kai-shek's Kuomintang, which asserted that it alone had the right to govern the mainland. Chiang's successors abandoned this claim in 1991, clearing the way, in theory, for normal state-to-state ties across the Taiwan Strait. Establishing such relations would remove the cause of a potentially ruinous war. In so doing, it would engender good will for China around the world. It would make the People's Republic appear far less threatening to its neighbors than it now does. It might give China full access, which it now lacks, to the cutting-edge computer chips that Taiwan manufactures, which would bring it substantial economic benefit.

Chinese recognition of Taiwan thus qualifies, not least for the People's Republic itself, as the international equivalent of low-hanging fruit. Yet there seems to be no chance whatever that China's government will pluck it. Why is this so?

A decision to abandon the claim on Taiwan would have to come from the supreme Chinese leader, Xi Jinping, and he appears to have personal reasons for continuing it. This was not true of the two most powerful previous Chinese communist leaders. Neither Mao Zedong nor Deng Xiaoping regarded Taiwan as an urgent matter. Mao is reported to have said in the 1970s that the union of the island with the mainland could wait for 100 years. The two could adopt this attitude because they had political

legitimacy that Xi does not possess: Mao from leading the communist takeover of China, Deng from presiding over its economic modernization. They could afford, politically, to defer the Taiwan question indefinitely. By contrast, Xi, who came to power after communist rule was firmly established in China and who inherited surging economic growth – which has slowed during his time in office – lacks their political armor. Moreover, like so many leaders who seek to leave behind them monuments of one kind or another, Xi seems to wish to be remembered in Chinese history as the man who recovered – as he would see it – Taiwan.

Xi will not hold supreme power in China forever, even if, like Mao, he holds it for life. In all probability, his successor will come from the Communist Party, and whatever changes in the policies and governance of the People's Republic that person may make, with the position as leader will come incentives to maintain the claim on Taiwan. The new leader will be steeped in, and be the product of, communist political culture. Since the time of the first communist dictator, the Russian V.I. Lenin, that culture has eschewed political pluralism and emphasized domination, control, and the use of force to secure both.

The next Chinese leader will also be likely to share Xi's goal of maintaining the Communist Party's monopoly of power. The vast police-state apparatus that the Party has constructed over more than seven decades serves this purpose, of course; but to cultivate popular support, and in the absence of the promise of revolutionary transformation that Mao offered and the double-digit economic growth that Deng began, the post-Xi leader is likely to rely, as has Xi, on the nationalist appeal that inheres in the claim to Taiwan. Nationalism of an aggressive kind has become increasingly important to the Party as belief in the precepts of Marxism-Leninism-Maoism, the initial justification for its rule, has all but collapsed.

The Communist Party's position on Taiwan serves the purpose of self-preservation

in another way. Recognizing Taiwanese independence would lend legitimacy to Taiwan's democratic political system. It would concede, if only tacitly, that Chinese people can govern themselves democratically; and if the people of the mainland were to take that point to heart, this would jeopardize Communist rule there.

From the forgoing analysis it might seem to follow that the end of communist rule in China, unlikely though that may be in the short term, would make possible the abandonment of the insistence that Taiwan is a breakaway province that must be returned to the control of the mainland. Even that development might not suffice, however. A post-communist government of China would have at least two reasons for continuing the Communist Party's Taiwan policy. First, such a government would be likely to aspire to Chinese primacy in East Asia and beyond. Not only the communists, but also Chiang Kai-shek's Kuomintang whom they displaced and the Qing dynasty that governed the country from the seventeenth century to the twentieth, both had that goal. Control of Taiwan would pave the way for Chinese maritime supremacy in the western Pacific, which a post-communist Chinese regime, if the past is any guide, might well pursue.

In addition, accepting Taiwanese independence could call into question the inclusion within the borders of the Chinese state of large parts of what is now the People's Republic. The country's dominant ethnic group, the Han Chinese, comprise 90 percent of its population, but the homelands of the Buddhist Tibetans and the Muslim Uighurs stretch over more than 40 percent of its territory; and these groups would surely secede from China if they could. Official acknowledgement of Taiwanese independence would only encourage them. The potential loss of that much of the country would probably not sit well with even the most liberal-minded Chinese citizens.

Thus, the Chinese claim to govern Taiwan, despite the dangers it poses and the costs, actual and potential, it imposes on China,

has considerable staying power. Recognizing Taiwanese independence, for all the benefits it has the potential to bring, would appear to have no constituency in China. It is decidedly not acceptable to Xi Jinping. It is highly unlikely to be acceptable to his successor. And it may well be unacceptable, for the foreseeable future, to the Chinese people themselves. *

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Credit: Reuters



THE FUTURE OF AN ILLUSION “WISH FULFILLMENT” IN WORLD POLITICS



by Louis René Beres

In his major work on religion, *The Future of an Illusion* (1927), Sigmund Freud offers a broad definition of “illusion.” According to Freud, “We call a belief an illusion when wish-fulfilment is a prominent factor in its motivation and in doing so we disregard its relation to reality.” Examined in terms of Israel and world politics, this definition is dense with implication. It is a definition that could help Israelis understand the vital linkages between “wish fulfilment” and jihadist enmity, and also the lethal consequences of global anarchy.

By its original meaning, Freud’s “illusion” references hope for personal immortality. If extended to world politics, this term could also suggest illuminating linkages between power over a despised adversary and “power over death.” For Israel, in particular, it could clarify the long-term security costs of short-term military “victories,” even against Iran.

Always, in Jerusalem, fashioning national survival strategies should be considered an intellectual task. In the seventeenth century, political philosopher Thomas Hobbes’ *Leviathan* described the global “state of nature” (aka world politics) as a “state of war.” Because this condition stipulates the absence of a world government authority to keep countries “in awe,” the international system’s unchanging dynamic is a violent struggle of “all against all.” Inevitably, as we ought already to have learned from history, seeking to survive through belligerent nationalism (i.e., via competitive risk taking) is futile. Recalling Sigmund Freud, any such search is merely an “illusion.”

Is there anything to be learned from Freud and Hobbes to meaningfully create a safer system

of world politics? Though any proposals to implement a more centralized system of power and authority would be labeled “unrealistic,” nothing could be less realistic for states than to base national survival on a “balance of power.” Accordingly, all must promptly inquire: *How should rational leaders proceed?*

To begin, world history will deserve pride of place. Since the Peace of Westphalia in 1648, global politics have been shaped by sovereignty-centered belligerence. When considered over time, especially as the technologies of military destruction have become more “advanced,” this system of competitive nationalism exhibits one overriding deficit: *It is destined to fail.*

For humankind, there should emerge one general expectation. This is the obligation of states to replace “Westphalian” threat-system dynamics with plausibly durable mechanisms of world legal order. Animating this core obligation would be scholars who could finally understand that only a true visionary could be a true realist.

One point is incontestable. If left unchallenged, world politics will undergo increasingly catastrophic breakdowns. To call for yet another round of “tribal conflict” would be to reject everything we ought already to have learned about law, civilization and “wish fulfilment.” For Israel, the fact that such a tiny and beleaguered state has been effective in its brief history of war-fighting ought not to be taken as “evidence” of future or protracted efficacy.

There is more. Going forward, Israel cannot afford to detach its own national survival strategies from the wider considerations of planetary survival. Unless world leaders take tangible steps to implement a cooperative planetary civilization – i.e., one based on the central truth of human “oneness” – there will be no civilization for any state. To reject this sobering conclusion would require world leaders to accept that an inherently corrosive ethos of

“everyone for himself” could somehow be made reasonable. *Prima facie*, any such requirement would not “only” be illogical. It would also represent a grievous violation of international law and a rejection of Jewish precepts of justice.

In world politics, retreats from “wish fulfilment” policies will require serious erudition and diligent study – traits long-connected to Jewish intellectual life. A universal dimension of species identity (“human oneness”) can be encountered not just in Torah and Talmud, but also among such expressly secular thinkers as Søren Kierkegaard, Sigmund Freud, Hermann Hesse, Carl Jung, Jose Ortega y Gasset, Miguel de Unamuno and Pierre Teilhard de Chardin. The fact that such exceptional thought is almost always disregarded in “real life” is lamentable testimony to how little is being done to save an imperiled planet from itself.

In all world politics, not just the Middle East, everything begins with the individual, with the microcosm. More precisely, humans generally fear solitude or “aloneness” more than anything else on earth, sometimes even more than death. Amid the chaos that is already stampeding across entire continents, individuals still prioritize loyalty to variously dissembling claims of “tribe.” Ironically, because the cumulative effect of these private claims is radical insecurity for all, such loyalty is irrational. Ultimately, *ipso facto*, it is self-destructive for both microcosm and macrocosm.

There is more. Among Israel’s enemies, loyalties to tribe may carry within themselves a witting embrace of “martyrdom.” Recalling the marooned English schoolboys in William Golding’s *Lord of the Flies*, Israelis may be reminded here that the veneer of human civilization is razor thin. Impressive scientific and medical discoveries aside, whole swaths of humankind remain fiercely dedicated to murderous visions of “sacrifice.” Prophetically, wrote Jewish psychologist Otto Rank in *Will Therapy and Reality* (1945): “The death fear of the ego is lessened by the killing, the Sacrifice, of other; through the death of the other, one buys oneself free from the penalty of dying....”

Hope still exists, but now it must sing softly, with circumspection, inconspicuously, *sotto voce*. Though counter-intuitive, incentives for celebrating gleaming new space technologies are exaggerated or contrived. Though Space X-type

ventures promise wealth, excitement and glory, humankind ought not suffer the captivating delusions of extra-terrestrial “progress.” At best, rather than produce a safe-haven for human beings on distant planets, such delusions would only extend bitter human defilements to outer-space.

In *The Decline of the West*, first published during World War I, Oswald Spengler inquired: “Can a desperate faith in knowledge free us from the nightmare of the grand questions?” This remains an indispensable query. Among other things, a correct answer would acknowledge that war and terrorism can never be countered with more “advanced” weapon systems or by transporting human populations to extra-terrestrial habitats. To believe otherwise is to accept an ultimate illusion.

Always, truth is exculpatory. Presently, our tribal planet lacks a tolerable future not because we have been too slow to learn what has been taught, but because what has been taught is generally beside the point. That point should be the core species obligation to seek a science-based human survival, not illusionary goals of durable military victory.

Even if all current wars in the Middle East could somehow be ended “successfully” (an inconceivable expectation), the underlying system of world politics would remain structurally unstable and psychologically self-deceiving. For all states, but for Israel in particular, any further decisions to seek protracted security through protracted conflict would represent abandonment to Sigmund Freud’s “wish fulfilment.” From such a witting abandonment, Israel could expect only war, terrorism and irremediable despair. *

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THE CLASH OF CIVILIZATIONS AND TRUMP'S FOREIGN POLICY

Credit: Reuters



by Benjamin Miller

Is the Iran War a manifestation of the rise of the Clash of Civilizations as a dominant attribute of current international politics? This conception of a civilizational clash seems relevant to the current war in the Middle East. A Christian-majority state and a Jewish state cooperate in a joint war against a country ruled by an extremist Islamist (Shiite) regime. Moreover, the Trump administration is influenced by the conception of the Clash of Civilizations in additional global political contexts. Seemingly, we have here the fulfillment of Samuel Huntington's theory from three decades ago that such a clash will shape global politics. Still, I'll argue here that the picture is more nuanced as the Trump administration's version of the Clash of Civilizations differs markedly from the original Huntingtonian one. In addition, both conceptions have serious limitations in their application to global politics.

Samuel Huntington published his influential book *The Clash of Civilizations* in 1996 (an earlier short version was published in *Foreign*

Affairs in 1993). Huntington proposed dividing the world into seven or eight civilizations on a cultural basis, closely related to a religious identity. The validity of such a division, and especially Huntington's general prediction of the coming clashes among the different civilizations in the post-Cold War era, were subjected to a barrage of criticism, but that didn't prevent his thesis from becoming widespread and influential. The book focuses especially on the possibility of a clash between the West and two rival civilizations: Islam and the Chinese civilization. Putting China aside, the current war in the Middle East seems to highlight the clash between the West and Islam: the leader of the West (the US) and a Western country (Israel) are waging an intense war against a radical Islamist regime.

However, the application of the Huntingtonian thesis of the Clash of Civilizations to the Iran War is problematic. While the Trump administration does seem to be guided by a 'civilizational' approach, it is markedly different from the original Huntingtonian one.

Huntington's book was written in opposition to an alternative liberal thesis, which dominated the immediate post-Cold War era in the early

1990s. This opposing thesis was introduced in the famous article on "The End of History" by Francis Fukuyama. The article gained a large influence because it reflected the widespread belief in the West that with the end of the Cold War, humanity is going to endorse the principles of liberalism — democracy, human rights and free markets. Moreover, it seemed that all the ideological rivals of liberalism—such as Communism, Fascism and Nationalism—were ideationally defeated and no longer enjoyed mass support, in contrast to liberalism, which, according to Fukuyama, did enjoy mass support and therefore provided the common dominant ideational base for humanity. As a result, the spread of liberalism reduced the danger of conflicts and wars in the world.

In contrast to Fukuyama's optimistic thesis, Huntington's alternative approach argued that it is impossible to promote the Western liberal values in non-Western cultures. Such an attempt is only likely to aggravate conflicts, mainly in those cultures which are the least prone to accept liberal values, namely China and Islam. Huntington argues that these civilizations are collectivist—namely the loyalty to the group is stronger than individual rights. This is in contrast to the West, where the individual is at the center. This difference is explained by historical processes which took place only in the West and not in other cultures, most notably the Renaissance, the Reformation, the Industrial Revolution, and the French Revolution. A major outcome of these historical processes was the rise of liberalism and individual rights. Since these processes and revolutions didn't take place in non-Western cultures, a huge gap emerged between the liberal West and other civilizations, which creates major obstacles to adopting liberal values and institutions.

Among large segments of Trump's supporters, there is a powerful belief in a clash of civilizations, which similarly to Huntington views radical Islam and also (if to a somewhat lesser extent) China as major rivals of the West. Yet, there is a major difference between the

Huntingtonian view of the clash of civilizations and the view of Trump's supporters. For Huntington, the major problem confronting the West is the lack of preparedness of the Islamic and Chinese civilizations for liberalization, in contrast to the liberal perspective, which believes in the universality of the liberal tenets and their applicability to every culture. In contrast, for Trump's supporters the clash of civilizations is based squarely on religious differences.

This difference of perspective stems from a different conception of what constitutes "the West." From the Huntingtonian perspective, the West is identified with liberalism. Many of Trump's supporters, on the other hand, identify not with the liberal West, but rather with "the Jewish-Christian Tradition." Such a perspective leads to the idea that the West, and first and foremost the US, needs to confront radical Islam, which is perceived to pose an existential threat to it. The perceived threat is posed from without, most notably from the Islamic revolutionary regime in Iran, as well as from within, notably the waves of Muslim migrants to the West, mostly to Europe. According to the national security documents of the Trump administration published in late 2025, this mass migration to Europe threatens to bring about the "civilizational erasure" of Europe—unless it commits itself to stop it.

As for minimizing the role of liberalism as the common denominator of the West, Secretary of State and current National Security Advisor Marco Rubio underlined in his talk at the Munich Security Conference in February 2026 that the common denominator of Europe and the US emerged in the pre-liberal (and even anti-liberal) period of European colonialism. According to Rubio, the key shared Euro-American element is their Judeo-Christian religious identity (although he only refers to Christianity in this speech) as well as their common ethnic origin. The Trump administration also supports the right-wing populist and anti-liberal parties in Europe,

and it is working against the liberal European establishment affiliated with the EU. The right-wing populist parties tend to highlight the Christian tradition of the European continent. A key example is the support of the Trump administration for the illiberal-nationalist Victor Urban in the Hungarian elections of April 2026 (which he lost).

With the outbreak of the Iran War, the Christian dimension was expressed dramatically in the religious terminology of Secretary of Defense Pete Hegseth. Thus, he asked Americans to pray for victory in the Middle East “in the name of Jesus Christ.” Hegseth also likened the rescue on Easter Sunday of a missing American airman shot down over Iran to the resurrection of Christ, as the airman was rescued on the day Christians celebrate the Resurrection. Hegseth idolizes the Crusades, which provide an historical precedent of a supposed “clash of civilizations” between Christians and Muslims. In his book *American Crusade* Hegseth argues that these bloody medieval wars in the Middle East were justified because they saved Christian Europe from the onslaught of Islam.

While Hegseth’s language may seem extreme, he is certainly not alone in his views. President Trump has similarly asserted that God supports the Israeli-US war against Iran. Many of Trump’s Christian supporters tie US nationalism with religious virtue. They see themselves as combatants in a holy war that aims to roll back secular and pluralist values and establish the US as a fundamentally Christian nation.

The Civilizational approach can provide an explanation of some key variations in the foreign policy of the Trump administration: the growing split with Europe and Ukraine in contrast to a rapprochement with Russia and the very close relations with Israel. The rising split in NATO during the Iran War might be mainly accounted for by different political and military approaches to the war. Yet the ideological split between the civilizational conception of the conflict by the US administration versus the liberal approach of Europe based on international law, at the

minimum, deepens the political gap between the parties.

Such a gap between Civilizational and liberal approaches may also account for the growing split between Europe and the Trump administration with regard to Russia and Ukraine. The sympathy that the administration shows toward Russia is influenced by realpolitik and transactional considerations (to bring about a split between Russia and China; to make deals with regard to Russian natural resources). Yet, it seems that it is also influenced by the Trump administration’s perception of Putin’s Russia as seemingly representing a Christian tradition which advances “traditional values” such as the centrality of the Church, in addition to other traditional values such as the heterosexual family and the homeland. In contrast, the democratic character of Ukraine (even if imperfect) in contrast to the authoritarian regime in Russia, doesn’t constitute a sufficient reason in the eyes of the Trump administration to provide full support for Ukraine—in contrast to the policy of Biden’s previous liberal administration.

The Civilizational logic also partly explains the US support for Israel, culminating in the joint war against Iran. A key portion of Trump’s supporters, notably the Christian Evangelicals, perceive Israel as fighting on the civilizational front line on behalf of the Judeo-Christian civilization against radical Islam. Israel, in this view, protects the Judeo-Christian world and therefore it is imperative for the US to support Israel almost unconditionally. The current American ambassador to Israel—Mike Huckabee, who is a Christian Evangelical—is a loyal representative of this approach, one that no American ambassador to Israel exhibited under previous US administrations. The political support of the Evangelicals for Trump’s administration is one of the major reasons why the administration tends to endorse their views on Israel.

At any rate, there are limits to the Clash of Civilizations approach, either in the

Huntingtonian version or the Evangelical one. A large share of the world’s conflicts take place not between civilizations but within them. For example, a major conflict within the Chinese civilization is between China and Taiwan; the Russia-Ukraine war takes place within the Slavic-Orthodox civilization; and there are quite a few bloody conflicts within Islam such as the recent or current civil wars in Libya, Syria, Yemen, Iraq and partly also Lebanon. Even in the current Iran War, we may note the large-scale Iranian firing of missiles and drones at the Muslim Gulf states. Indeed, many more casualties were caused in recent years as a result of the intra-Islamic wars than as a result of the Clash of Civilizations.

In sum, the conception of the West as based on a “Judeo-Christian tradition” reinforces the alliance between the Trumpist USA and Israel against radical Islamist Iran. This conception also provides some of the reason for the current US policy toward Russia, as well as for its support of the populist-nationalist right in Europe, notably in the context of their opposition to mass migration. *

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THE ARCHITECTURE OF POWER

An anti-missile system operates after Iran launched drones and missiles towards Israel, as seen from Ashkelon, Israel April 14, 2024.
Reuters/Amir Cohen





by Raghu Kondori

Israel, Iran, and the Future of Regional Order: As power shifts from territorial advantage to the control of interconnected technological systems, the Middle East is emerging as a critical laboratory where energy, compute, and strategic alignment may shape the architecture of the twenty-first century.

Ecosystem of Power: Israel, Iran, and the Evolution of Regional Order

Israel's strategic history cannot be separated from the changing structure of Iran. In its early decades, Israel depended on Western protection while also benefiting from a quiet, unofficial relationship with pre-revolutionary Iran. This relationship was built on energy exchange, discreet coordination, and a shared perception of vulnerability within a hostile regional environment. While political constraints prevented formal alignment, the underlying logic was functional: Israel gained strategic depth, and Iran contributed to a broader regional equilibrium.

This historical period reveals a principle that extends beyond its immediate context. Israel is structurally stronger when it is not surrounded exclusively by adversarial systems. The relationship with Iran was not based on ideological affinity, but on functional convergence. Security, energy, and regional calculation formed part of a wider ecosystem that reduced strategic isolation. In this sense, Iran occupied an important place within Israel's

strategic horizon even in the absence of formal recognition.

The 1979 revolution fundamentally altered this configuration. Iran shifted from a peripheral stabilizer to a central organizer of regional opposition. This was not merely a change of government, but a transformation of regional logic. Ideology became institutionalized through proxy networks, asymmetric warfare, and long-term strategic pressure. Over time, this produced a distributed system of conflict stretching across multiple fronts rather than a series of isolated confrontations.

The significance of this transformation became increasingly visible over the following decades. Hezbollah, Hamas, and other aligned actors were not independent phenomena. They emerged as interconnected components within a larger strategic ecosystem. The challenge facing Israel gradually evolved from managing individual threats to confronting a system capable of reproducing instability across different theaters simultaneously.

From Territory to Compute:

While regional dynamics evolved, a deeper structural transformation emerged globally.

Power is increasingly organized around computational capacity. Military effectiveness, economic productivity, intelligence systems, and technological innovation now depend on the ability to generate, control, and scale compute. Competition over advanced semiconductors, export controls, artificial intelligence infrastructure, and data architectures reflects this shift. Power is no longer defined primarily by territory or industrial output, but by position within interconnected technological systems.

This does not render geography irrelevant. Rather, geography is being absorbed into a wider architecture in which energy systems, compute infrastructure, and human capital interact as integrated layers of power.

Israel's traditional doctrine—based on deterrence, intelligence superiority, and rapid operational response—remains effective at managing immediate threats. However, it is less capable of shaping the structural conditions that generate those threats.

The events of 7 October 2023 exposed this limitation. Israel was not facing isolated actors, but a coordinated system capable of integrating ideology, operational planning, and technological adaptation across multiple fronts. Gaza functioned as one node within a wider regional structure involving Iran, Hezbollah, and aligned networks.

Security, therefore, can no longer be understood solely as threat response. It must be understood as system positioning.

Security as System Architecture:

The convergence of security systems and technological systems is increasingly eroding the distinction between geopolitical competition and infrastructure competition.

Regional orders were historically organized around geography, military balance, and resource access. These foundations remain relevant but are no longer sufficient.

Energy networks now sustain computational infrastructure. Technological systems shape military capability. Access to advanced knowledge systems determines long-term economic resilience. Security, development, and innovation are converging into a single structural domain.

Strategic advantage increasingly depends on position within the critical nodes through which energy, information, capital, and expertise circulate. Power is shifting from control of territory to control of system architecture.

Power as System Design:

In this environment, power is no longer defined solely by military or economic scale. It refers increasingly to the capacity to design systems and shape the conditions under which other actors operate.

Influence is exercised through standards, chokepoints, verification regimes, and access

structures. These determine how technology flows, how capital is allocated, and how infrastructure is secured.

Artificial intelligence illustrates this transformation particularly well. Advanced AI systems depend on a complex layered ecosystem of semiconductor fabrication, design architecture, data infrastructure, cloud systems, energy inputs, and specialized human expertise. Strategic influence lies in coordinating these interdependencies rather than dominating any single layer.

The emerging global order reflects this logic. It is neither fully globalized nor fully fragmented, but increasingly stratified. Critical technological layers are concentrated within trusted networks, while other components remain widely distributed. This creates asymmetric interdependence, where influence derives from control of indispensable system positions rather than territorial dominance.

Iran as Structural Pivot:

Within this architecture, Iran occupies a pivotal position.

Its current configuration, within the post-1979 Iranian state system, allows it to project instability across multiple fronts through proxy forces, ideological mobilization, and asymmetric instruments of power. However, Iran's deeper significance extends far beyond this operational configuration.

As a civilizational and geographic entity—what I have previously described in my "Onion State" analysis as a layered and resilient structure—Iran possesses characteristics that few regional actors can match: a large population, substantial energy resources, strategic depth, industrial potential, historical continuity, and deep structural resilience. These attributes give Iran an outsized capacity to influence the broader regional system independent of any specific political configuration.

Geography amplifies these advantages. Positioned between the Gulf, Central Asia, the Caucasus, and the broader Middle East, Iran occupies a strategic crossroads that magnifies the regional consequences of either instability or integration.

For this reason, Iran functions as a structural pivot rather than simply another regional actor.

A structurally reoriented Iran—a post-ideological strategic configuration grounded in state-centered governance, institutional continuity, and national interest rather than ideological projection—would fundamentally alter the regional equation. Such a transformation would not automatically produce alignment or convergence, but it would shift the underlying architecture that currently sustains persistent regional conflict.

The significance of such a shift lies not in ideological change but in system-level effects. A structurally reoriented Iran would move from exporting systemic instability under its current post-1979 configuration to participating in a more stable regional architecture. The result would be the opening of strategic space for long-term coordination across energy systems, technological infrastructure, trade networks, and security arrangements.

This does not imply inevitability. Several trajectories remain possible. The current post-1979 Iranian state configuration may persist. Internal fragmentation may intensify. Regional containment architectures may deepen. Alternative corridors—such as Israel–Gulf–India connectivity frameworks—may expand independently of Iran.

Each scenario carries distinct strategic consequences.

Yet among the plausible alternatives, a structurally reoriented Iran represents the highest-leverage pathway available, addressing the architecture of conflict rather than merely its operational expressions.

Pax Silica as Prototype:

The future regional order will not be defined solely by military balance or diplomatic alignment. It will be shaped by the integration of energy systems, computational infrastructure, technological ecosystems, supply chains, and human capital.

Pax Silica is an emerging infrastructural alignment in which energy, compute, and trusted technological systems are integrated into a layered architecture of managed interdependence, where strategic influence is determined by position within the computational stack rather than territorial control.

It represents neither a traditional alliance system nor a universal order, but a functional architecture built around trusted participation in critical technological networks.

This alignment is not a formal alliance or treaty structure, but a functional configuration linking large-scale energy producers, advanced technological nodes, and capital-rich investment systems into a coordinated infrastructure environment. Its logic is infrastructural rather than ideological.

The United States, Israel, and key Gulf actors increasingly form the foundational elements of this emerging prototype. Its purpose is not political unification, but the construction of trusted systems capable of supporting advanced computational and technological ecosystems under conditions of strategic competition.

Tri-Layer Architecture:

This system can be understood through three interconnected layers.

The first layer consists of energy and capital. Gulf states function as providers of computational mass, supplying the energy and investment required for large-scale AI systems, data centers, sovereign cloud infrastructure, and digital economies. Their role extends beyond resource ownership to infrastructure hosting, shaping where computational capacity is physically concentrated. Increasingly, they also exert demand-side influence, as sovereign investment programs and digital transformation strategies shape global infrastructure deployment.

The second layer consists of semiconductors, cybersecurity, and system integration. Within this layer, Israel functions as a Sovereign Tech Node. Its strategic role derives from its concentration of cybersecurity expertise, defense technologies, research institutions, and deep integration into Western innovation ecosystems. In an environment defined by trusted networks and export controls, its value lies in enabling secure system integration across regional and global architectures.

The third layer consists of human capital. This includes domestic talent, research institutions, entrepreneurial ecosystems, and globally distributed technical diasporas. These networks connect regional systems to global knowledge production, enabling continuous

innovation and system adaptation. While mobile and decentralized, human capital remains essential to the design and governance of complex technological infrastructures.

Together, these three layers form a structure of asymmetric interdependence. Energy enables computation, computation depends on secure technological systems, and both depend on human expertise to function and evolve. Data and information flow across all three layers, connecting energy, computation, and human expertise into a single operational ecosystem.

Conditional Alignment:

The objective of this architecture is not political uniformity. The region remains defined by divergent interests, identities, and strategic priorities.

The challenge is therefore not convergence, but conditional alignment: the creation of interoperable systems that allow cooperation within defined domains without requiring broader political consensus. Participation depends not on political uniformity, but on adherence to shared technical and operational standards.

Shared technical standards, verified infrastructure boundaries, and secure governance protocols enable interaction within a structured environment. Stability emerges not from agreement, but from embedded participation in systems whose disruption carries mutual cost.

Within this framework, a structurally reoriented Iran would become a critical node of integration. Its energy base, human capital, and geographic position would allow it to participate directly in regional technological and economic systems, shifting competition into structured rather than purely confrontational forms.

The Middle East as Laboratory:

The significance of this transformation extends beyond the region.

For much of the modern era, Middle Eastern actors operated within architectures designed externally. The region is now becoming a laboratory for a different model of organization, in which energy, computation, technology, and human capital are integrated under conditions of sustained geopolitical competition.

Few regions concentrate these variables with

equal intensity. Energy abundance, geopolitical competition, technological ambition, and strategic geography converge in the Middle East with a density that is difficult to replicate elsewhere. The outcome will therefore inform broader patterns of global system design in the decades ahead.

For Israel, this requires a strategic evolution. Military superiority, deterrence, and intelligence dominance remain necessary but are no longer sufficient. Security increasingly depends on the capacity to shape the architecture within which threats emerge and evolve.

Power is no longer defined solely by the ability to act within a system, but by the ability to design the system itself.

Israel, Iran, and the broader Middle East are not separate strategic problems, but interconnected variables within a single evolving architecture defined by energy, compute, technology, and human capital.

Historical precedent shows that alternative configurations are possible. Current conditions show the cost of their absence. The region's future will be determined not only by the balance of power among states, but by the architecture of the systems that connect them.

The central question is no longer whether force will remain relevant—it will—but whether regional actors can construct a durable architecture capable of channeling force, competition, and technological transformation before competing systems define the region for them.

The transition has already begun. Its final structure remains open. *

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Credit: Reuters



by Pavlo Zhovnirenko

The international order established after World War II rests on a simple idea: states agree to live by a common set of rules. International law has served as the foundation for security, economic cooperation, and the relative predictability of international relations over the past several decades.

Today, however, that system is facing a profound crisis. The problem is not only that authoritarian regimes increasingly violate international law openly – disregarding the territorial integrity of other states, rejecting the principle of sovereignty, systematically violating human rights, and ignoring their international obligations. Equally dangerous is the fact that they have learned to benefit from a legal system they openly reject. Having eliminated free speech, judicial independence, and political competition at home, they use democratic freedoms, international agreements, and legal protections abroad to strengthen their own regimes and expand their influence.

This is one of the central weaknesses of today's international order.

Every legal system – from ancient customary law to modern constitutional law – consists of two inseparable elements: rules and consequences for violating them. It is the combination of these two elements that makes law more than a declaration of good intentions

and turns it into an effective mechanism for regulating human affairs. Because of its relative youth, international law has developed a sophisticated body of rules but has yet to establish the second essential component: an effective mechanism for swift and inevitable consequences for serious violations of those rules. This gap allows rogue states to enjoy the benefits of the international legal order while simultaneously undermining it.

Russia's aggression against Ukraine has made this problem impossible to ignore. Since the beginning of the full-scale invasion, Western countries have debated whether to confiscate frozen Russian state assets to compensate Ukraine for the enormous damage caused by the war. The United States has already established a legal framework for doing so. Yet many European governments continue to resist similar measures, citing the need to uphold international law and the inviolability of property rights.

Such concerns would be entirely understandable if Russia itself recognized international law as binding. Instead, it was Russia that first rejected those rules through its unprovoked war of aggression, occupation of foreign territory, destruction and expropriation of Ukrainian public and private property, mass repression, deportation of civilians, and numerous other international crimes.

The same pattern can be seen in the information sphere. The Russian government has all but eliminated freedom of speech at home. Independent media outlets have been

shut down or forced into exile. Journalists are persecuted, and even criticism of the authorities on social media lead to criminal prosecution. At the same time, the Kremlin's information machine has for years exploited the openness of democratic societies to conduct large-scale influence and disinformation operations abroad. State-controlled media platforms, which in practice function as instruments of Russia's security services, have operated in democratic countries while enjoying legal protections designed to safeguard independent journalism – not state propaganda or industrial-scale disinformation. In the United States, such activities long benefited from the protection of the First Amendment – one of the greatest achievements of American democracy. A constitutional guarantee intended to protect citizens from government interference was effectively used by a foreign authoritarian regime as a weapon in an information war against democracy itself.

Both examples point to the same systemic problem: democracies continue to treat regimes that flagrantly violate international law as though they remain good-faith participants in the international legal order. That is neither just nor consistent with the logic of law itself.

In every national legal system, an individual who commits a crime automatically loses certain rights and privileges. This does not undermine the rule of law. On the contrary, it is how the law protects itself.

The Anglo-American legal tradition has long recognized the doctrine of unclean hands: a party that has acted in bad faith cannot seek equitable relief while relying on principles of fairness. The same logic is reflected in Article 60 of the Vienna Convention on the Law of Treaties. A material breach of a treaty by one party entitles the other parties to suspend the performance of their obligations toward the violator in whole or in part. Equally fundamental is the principle of reciprocity, which underpins diplomatic, consular, commercial, and many other areas of international relations. No state is

required to extend all the benefits of cooperation to a partner that refuses to abide by the same rules.

These principles are already deeply embedded in modern law. It is only logical to apply them to states that systematically violate international law. Such an approach would produce three important effects.

First, it would restore the natural link between violating international law and losing some of its legal protections – a link that exists in every effective legal system.

Second, it would deny authoritarian regimes the ability to exploit the openness of democratic societies as a weapon against those very societies.

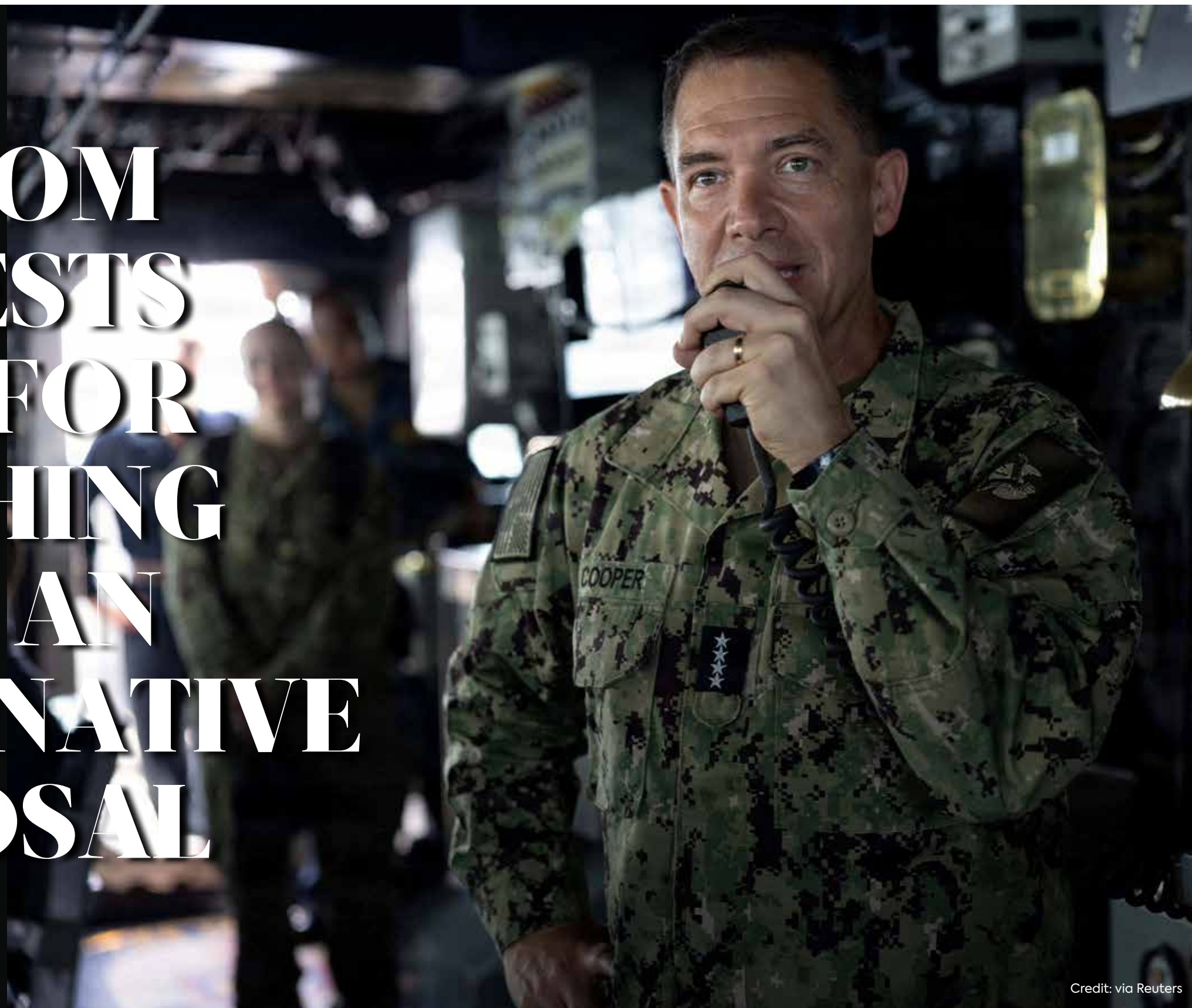
Third, it would strengthen the authority of international law itself. Every legal system becomes stronger when it refuses to allow wrongdoers to profit from their own wrongdoing.

International law was created to preserve peace, not to provide comfortable legal protections for those who destroy it. Today it has reached a natural stage in its evolution: the generally accepted legal protections of the international system should apply only to those states that themselves respect its fundamental rules. A state that deliberately rejects those rules should not remain a full beneficiary of the very system it seeks to destroy. A legal order that allows lawbreakers to benefit from the law will ultimately lose both its authority and its ability to preserve peace. *

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CENTCOM REQUESTS IDEAS FOR PUNISHING IRAN – AN ALTERNATIVE PROPOSAL



Credit: via Reuters



by Hanan Shai

RESPONSE TO U.S. CENTRAL COMMAND'S REQUEST FOR IDEAS ON PUNISHING IRAN

The unusual request by U.S. Central Command (CENTCOM) for new ideas on action against Iran offers a rare glimpse into the dead end into which the American campaign has drifted.

According to a CNN report, an officer in CENTCOM's intelligence branch circulated a request to a wide group of military analysts asking for "creative and unconventional" ways to pressure and punish Iran. Military sources described the solicitation—akin to a form of professional crowdsourcing—as an unusual step. In its response, CENTCOM did not deny the report; instead, it explained that its commander, Admiral Brad Cooper, routinely turns to members of his staff regardless of rank in order to improve operational performance.

Broad consultation is, of course, a worthy practice. Yet it is difficult to ignore the timing and the wording of the request. The appeal was sent after weeks of strikes that failed to alter Iran's negotiating position, and at a moment when the U.S. administration is weighing how to continue the war. At the same time, the Chairman of the Joint Chiefs of Staff, General Dan Caine, acknowledged that "air power has its limits."

The request supplies four important pieces of evidence about the war the United States is waging against Iran.

FIRST EVIDENCE: THIS IS A WAR OF ATTRITION

The use of the words "pressure" and "punishment" is not accidental. It reveals the American concept of the war: to inflict on Iran a sequence of heavy blows, gradually erode its capabilities, and persuade its leadership that the price has become too high to continue bearing. At that point Iran is expected to relent, come to the negotiating table, and accept terms it has so far rejected.

This is the practical definition of a war of attrition. The United States is not denying Iran the ability to continue fighting; it is trying gradually to influence Iran's will to do so. It is not defeating the enemy in order to impose its own terms of surrender; it is punishing the enemy in the hope that it will agree to negotiate the terms of an ending.

Attrition is not necessarily a failure. It can serve as a temporary, deliberate phase within a broader decisive concept: controlled waiting until capabilities and political conditions ripen for a move that removes the threat. The failure lies not in the use of attrition itself, but in the

absence of a plan for transitioning from it to decision.

In the war the United States is currently conducting against Iran, there is no sign of such a plan. Attrition is not a bridge to a decisive phase—it is the strategy. That is the difference between attrition as a means and attrition as a substitute for decision.

SECOND EVIDENCE: THE PUNISHMENT IS NOT ACHIEVING ITS PURPOSE

Had the sequence of blows brought Iran to the negotiating table on American terms, CENTCOM would not have needed an extraordinary call for additional ideas on how to punish it.

This does not mean Iran is not being hurt. It is absorbing heavy damage. But inflicting pain on the enemy is not the same as achieving the war's objective. If the blows do not change the adversary's decisions, adding more targets and punishments may simply enlarge the stockpile of damage without bringing the war any closer to an end.

The United States can determine the intensity of every blow it delivers against Iran. It cannot determine how many blows will be required before the Iranian leadership decides to relent.

This is Iran's great advantage in a war of attrition: the United States controls the intensity of the blows, but Iran controls the number of blows it is prepared to absorb—and thereby the duration of the war, the timing of its end, and indirectly the size of the U.S. military's munitions inventory. If Washington's patience runs out before Tehran's capacity for endurance is broken, Iran can achieve its aim simply by surviving until the adversary tires.

The pressures exerted by regional states on Washington to avoid escalation reinforce this advantage. The longer the war continues, the more opportunities arise for political, coalition, and economic considerations to halt the next strike before its purpose has been achieved.

THIRD EVIDENCE: THE DENIAL DOCTRINE IS BEING TESTED

Conducting the war as an accumulation of erosions, blows, and punishments is consistent with the denial concept associated with Elbridge Colby and influential in U.S. defense policy: the application of limited, graduated force to deny the adversary gains, alter its calculations, and bring it to negotiation without being drawn into a war of decision.

Yet when gradual erosion becomes a substitute for decision, the war becomes uncontrollable. A great power retains control over the intensity of each action, but not over the number of actions that will be required until the enemy changes its will. Choosing a path supposedly designed to reduce risks transfers control of the war's clock to the enemy.

CENTCOM's request suggests that the United States is losing patience before Iran loses the will to continue. If that is the case, it constitutes an important Iranian achievement.

The alternative is not stronger punishment, but a different logic of war. A war of decision does not try to persuade the enemy to yield through the accumulation of pain; it denies the enemy the ability to continue fighting effectively, whatever its will may be.

It requires identifying the centers of gravity of the adversary's war system, the assets essential to its functioning, and the vulnerabilities in their defense; concentrating effort against them; and neutralizing them in a way that triggers a cascade and dismantles the system. Once the enemy has been decided, one can dictate the terms for ending the war. There is no longer any need to wait until it agrees to come to the negotiating table.

FOURTH EVIDENCE: THE COMMANDER HAS DISAPPEARED FROM THE WAR

The fact that the request originated in the intelligence branch and was directed at military analysts reveals a deeper failure.

Intelligence is essential for knowing the enemy, exposing its capabilities, identifying vulnerabilities, and locating targets. Fire-support elements are essential for destroying them. But they are not a substitute for generalship, whose role is to conceive the operational idea that will decide the enemy and, in its light, to extract the full potential of the army's resources—even when most of them are standoff fires—so as to produce that decision.

The problem is not that CENTCOM is consulting. Every professional staff must gather information, examine alternatives, and conduct war games. The problem is the blurring of the boundary between the collection of raw material and the synthesizing work of generalship.

A systemic operational idea is not a pile of suggestions, nor a list of targets that can be crowdsourced. It is an intellectual creation of a commander, born of the linkage between the political purpose, an understanding of the enemy system, the principles of war and their reflection in historical precedents, available capabilities, and changing reality.

The precise war of attrition, managed as the destruction of targets by standoff fires, has created a tight, direct link between intelligence (which collects the targets) and the fire elements (which destroy them). The faster and more efficient this cycle becomes, the more the commander is pushed out of his unique role: to identify, in light of the war's purpose, the system that must be collapsed and dismantled, to select the asset critical to its continued functioning, and to conceive a stratagem that will bring about its collapse.

Thus a self-reinforcing cycle is created. The attrition doctrine seemingly reduces the need for operational-command thinking; as that thinking diminishes it atrophies, and the military becomes still more dependent on erosion, punishment, and target destruction. Intelligence offers still more targets, fires destroy them—and the war continues.

This is not only an American problem. In the IDF as well, the tight link between intelligence

and fires has pushed the commander aside and replaced systemic stratagem with target-production metrics. The technical success of the strike chain has obscured the fact that destroying many targets does not necessarily dismantle the enemy's war system so as to decide and subdue it quickly on our terms.

The question CENTCOM should be asking is not "What else can we hit?" but "What holds the Iranian war system together as a system, and how can it be dismantled?"

Intelligence looks for targets. Generalship looks for systems and the most effective way to decide them.

A POSSIBLE RESPONSE TO CENTCOM'S REQUEST

It is neither wise nor responsible to offer CENTCOM additional targets for intensifying the punishment of Iran. It is far better to use the invitation to propose an American-Israeli commanders' seminar to examine the principal reason the war is dragging on: the choice to wage it according to the attrition doctrine, without a plan for transitioning to decision.

Both armies have a distinguished history of successful wars of decision, and both share a need to strengthen once again the generalship that the attrition doctrine has atrophied.

In such a seminar one could briefly refresh the principles of a war of decision and analyze systems that were decided by brilliant operational stratagems: Washington's stratagem at Trenton, Winfield Scott's campaign that captured Mexico City, Patton's rapid turnaround in the Battle of the Bulge, MacArthur's landing at Inchon, and Schwarzkopf's stratagem in the first Gulf War. The campaigns the IDF conducted in the previous century are likewise a rich source of stratagems and decisions, some of them brilliant.

Thereafter, if the Americans agree, commanders from both countries could jointly examine, on the basis of current intelligence, an operational idea for the rapid decision of the

Iranian war system—using the means available to the United States and Israel, primarily standoff fires, and without departing from the war aims that have been set.

An emergency seminar held in the midst of a war cannot last more than a few hours. It may jump-start decisive thinking and produce a systemic idea, but it cannot close the gaps in knowledge and skill that have accumulated over more than two decades in which both armies drifted away from the doctrine of decision.

Such a seminar can therefore serve only as an immediate response, not as a fundamental remedy. A follow-on article will present a broader proposal for rebuilding the generalship that the attrition doctrine has eroded, drawing on the historical experience of the American and Israeli armies in restoring the professional competence of their commanders.

There is no need for yet another list of targets for stronger punishment of Iran. What is needed is a redefinition of the problem and commanders who know how to solve it.

CENTCOM asked for ideas to expand and deepen the punishment of Iran. Israel can place at its disposal a different proposal: not more targets, but a key—the transition from deterrent punishment, erosion, and attrition to rapid decision.

HANAN SHAI

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Credit: Middle East Images via Reuters Connect

WHY WINNING THE IRAN WAR REQUIRES THE ISLAMIC REPUBLIC'S UN- CONDITIONAL SURRENDER





by Michael Gfoeller

THE CURRENT STALEMATE

As of August 2026, nearly six months after the outbreak of hostilities on February 28, the Iran War has settled into a dangerous and unsustainable stalemate. The United States and Israel opened the conflict with a coordinated campaign that killed Supreme Leader Ali Khamenei, degraded Iranian military and nuclear infrastructure, and imposed severe costs on the regime. The subsequent US naval blockade has demonstrably bled Iran of oil revenues, while Iranian forces have exploited every operational pause to reconstitute key military capabilities. Yet the Islamic Republic endures. Calibrated pressure, intermittent diplomacy, and restraint have prolonged the war, enabled regeneration of Iranian forces, and left the core problem — the theocratic regime itself — intact. The Trump Administration must therefore adopt a clear policy of demanding the unconditional surrender of the Islamic Republic of Iran, to be followed by internationally supervised free elections. This objective should be implemented by immediately resuming air and missile attacks on a massive scale, striking strategic economic and infrastructure targets, and leveraging the still abundant classes of US munitions to overcome constraints on high-end systems such as Patriot and HIMARS. The aim must be the rapid collapse of the current regime.

THE TRAJECTORY OF THE WAR

The war's trajectory underscores why half-measures fail. The initial US-Israeli campaign through early April inflicted heavy damage on leadership targets, air defenses, missile production sites, naval assets, and command structures. A ceasefire around April 8 provided

the first significant window for Iranian recovery. The June 17 Memorandum of Understanding between President Donald Trump and Iranian President Masoud Pezeshkian temporarily lifted the US blockade, sought to reopen the Strait of Hormuz, and launched technical nuclear talks. That arrangement collapsed on July 8 due to Iranian attacks on commercial shipping. The United States reimposed its naval blockade of Iranian ports in mid-July and resumed strikes. Since early August, following the cancellation of a threatened multi-day air campaign, a new pause in major strikes inside Iran has held, even as naval enforcement continues and limited Iranian or proxy actions against vessels persist. Shipping through Hormuz remains far below pre-war norms of more than 100 vessels daily, with recent counts often in the single digits or low teens. This pattern of intense fighting followed by pauses has repeatedly allowed Tehran to adapt while the fundamental threat remains.

THE EFFECTIVENESS OF THE NAVAL BLOCKADE

The US naval blockade has proven one of the most effective instruments of U.S. pressure by directly targeting Iran's primary source of hard currency. Hydrocarbons have historically accounted for the bulk of Iran's export earnings. Pre-war and early-war exports hovered near 1.5–2 million barrels per day. The first blockade, enforced from mid-April, caused a dramatic collapse: May exports fell to historic lows of roughly 65,000–300,000 barrels per day according to key market trackers — less than one-sixth of prior levels and a six-year low. At conservative prices of around \$90 per barrel, daily revenues dropped from approximately \$165 million in March (when exports averaged

1.84 million barrels per day) to about \$27 million. Cumulative losses approached \$6 billion over April and May alone relative to earlier monthly returns. Floating storage built up behind the blockade line, production faced cutbacks to avoid storage overflow, and China's independent refiners — Iran's main buyers — faced disruptions despite discounts.

TEMPORARY RELIEF FOR IRAN UNDER THE JUNE MEMORANDUM OF UNDERSTANDING

The June MOU provided temporary relief for the Iranian economy. With the blockade lifted on June 17 and sanctions waivers issued, Iran rapidly cleared its accumulated inventories. Exports rebounded sharply, averaging about 1.75 million barrels per day in June and totaling over 50 million barrels in the initial weeks, generating an estimated \$4.5–6 billion or more in gross value. Iranian officials claimed sales exceeding 40–50 million barrels in short order, sometimes at premiums, and the Petroleum Ministry later reported significant wartime and ceasefire-period revenues that partially met annual budget targets. This surge offered a crucial financial buffer for the regime, though much of the value was discounted, delayed, or intermediated, limiting immediate liquid funds available to Tehran.

REIMPOSITION OF THE BLOCKADE AND ONGOING ECONOMIC PRESSURE

The reimposition of the blockade from mid-July reversed these gains. July exports averaged around 967,000 barrels per day (reflecting the partial-month effect), valued at roughly \$2.44 billion — down substantially from June. Loadings slowed, vessels were redirected, disabled, or boarded, and traffic remained suppressed into August. US officials, including Defense Secretary Pete Hegseth, have stated the blockade can be maintained indefinitely through ship rotations. Treasury officials have signaled further economic measures. The cumulative effect compounds wartime damage to Iran's energy infrastructure, strains its domestic refining and industrial inputs, and heightens

internal social and fiscal pressures. Iranian leaders have acknowledged that declining oil revenues contribute to their economic difficulties. While some stored oil continues to reach markets via residual pathways or earlier loadings (with payment lags of months), the blockade has bled Tehran of billions of dollars in potential revenue. Yet revenue pressure alone has not produced the political collapse of the Islamic Republic. The regime has absorbed economic pain before and retains its coercive control at home.

IRAN'S MILITARY RECONSTITUTION DURING OPERATIONAL PAUSES

More troubling is the pattern of military reconstitution during pauses in the fighting. US and Israeli strikes in the war's early phases heavily degraded Iran's defense-industrial base. CENTCOM assessments indicated that over 85 percent of certain ballistic missile, drone, and naval production capacity was damaged or destroyed, along with launchers, surface facilities, and conventional naval assets. Yet Iran's extensive underground "missile cities" and dispersed production networks have proven resilient. Tunnel entrances were collapsed, but many stockpiles survived.

During the April ceasefire and subsequent pauses, Iran prioritized rapid, targeted reconstitution. US intelligence assessments by May indicated that Tehran was rebuilding more quickly than expected, already restarting some drone production. Officials assessed that full reconstitution of drone attack capabilities could occur within as little as six months, exceeding prior timelines. Chinese components and Russian assistance reportedly aided Iran's efforts, though the blockade complicated imports. Iranian officials claimed production never fully ceased, with drone output rising dramatically (claims of tenfold increases in some periods or tripling relative to pre-war rates) and new serial-numbered systems entering inventory. By mid-2026 assessments, Iran had restored approximately 70–75 percent of its pre-war missile and drone stockpiles according to some estimates, clearing debris from dozens of tunnel entrances with heavy equipment to

regain access to hundreds of surviving weapons. Israeli officials later expressed shock at the speed of recovery, particularly in ballistic missiles. Despite expectations that the campaign had set the industrial base back by years, Iran focused its diminished resources on high-priority systems rather than comprehensive restoration. Production of new ballistic missiles reportedly resumed at rates potentially reaching 100–300 per month in optimistic scenarios, which could restore arsenals to mid-2025 levels by early-to-mid 2027. Underground facilities were reopened, forces regrouped, and adaptive manufacturing continued in surviving or improvised sites. Iranian statements asserted that forces had “rebuilt themselves” during ceasefires and that new weapons stood ready. Naval and conventional forces remain more constrained by port damage and losses, pushing emphasis toward asymmetric IRGC capabilities, such as fast boats, drones, and coastal missiles.

THE LIMITS OF IRANIAN RECOVERY

These reconstitutions are incomplete and face headwinds. The blockade restricts dual-use imports critical for advanced components. Broader industrial damage, power disruptions, and resource diversion limit the scale of Iran’s military industrial recovery. Full pre-war capacity has not returned, and sustained high-tempo operations would again deplete stocks. Nonetheless, the pauses have enabled Iran to restore sufficient residual threat capacity to impose serious potential costs on regional targets, shipping, and US forces. Every interval of U.S. restraint has been converted by Tehran into a regenerated offensive capability.

THE CASE FOR DEMANDING IRAN’S UNCONDITIONAL SURRENDER

These facts dictate the required policy. Negotiated arrangements that leave the Islamic Republic in power merely reset the clock for further reconstitution and renewed aggression. Ending the war with a settlement that leaves the Islamic Republic in some form in power makes about as much sense as leaving a “reformed” Nazi party in power in Germany would have in

1945. It guarantees that the war will continue indefinitely, while Iran reconstitutes its nuclear, ballistic missile and drone programs. The only durable solution is the unconditional surrender of the regime, followed by internationally supervised free elections that allow the Iranian people to choose a post-Islamic Republic government. This is not maximalism for its own sake; it is the logical endpoint of a conflict the regime itself chose to escalate through proxy wars, nuclear defiance, and direct attacks. Half-measures that preserve the clerical apparatus ensure that oil revenues, once restored, and rebuilt missile forces will again underwrite regional destabilization.

RESUMING MASSIVE AIR AND MISSILE ATTACKS

Implementation requires the immediate resumption of air and missile attacks on a massive scale. The objective is not attrition or bargaining leverage but the accelerated collapse of regime control. Strikes should concentrate on strategic economic and infrastructure targets: remaining oil export terminals and related facilities beyond those already degraded, power generation and transmission networks that sustain both military and civilian coercion, transportation nodes, communications infrastructure, and financial and administrative centers of regime authority. Such targeting multiplies the effects of the naval blockade by further crippling revenue generation, internal logistics, and the regime’s ability to maintain domestic order. The psychological and practical impact of sustained, high-volume attacks on the pillars of regime power can induce the fractures — elite defections, popular unrest, and command breakdown — necessary for its rapid collapse.

OVERCOMING CONSTRAINTS ON HIGH-END MUNITIONS

Constraints on high-end munitions must not become an excuse for hesitation. Shortages of Patriot interceptors, HIMARS rockets, and certain precision systems are real after months of high-tempo operations. These limitations can and must be mitigated by leveraging the

still-abundant supply of other US munition classes. Large inventories of gravity bombs, JDAM kits, cruise missiles of available types, naval gunfire support where applicable, and other conventional ordnance remain available for mass employment against fixed economic and infrastructure targets. The United States retains the capacity for sustained high-volume strike packages using these systems, delivered by aircraft, surface vessels, and submarines. Quantity and persistence against critical nodes can achieve strategic effects even when the most exquisite munitions are conserved for defensive or high-priority missions. Production ramps already underway can further expand available stocks. The alternative — prolonged pauses that permit Iranian reconstitution — only increases the eventual cost in both munitions and lives.

ADDRESSING CONCERNS ABOUT ESCALATION AND CONSEQUENCES

Some will raise concerns about escalation, humanitarian consequences, and regional instability. These risks exist under any course of action, including the current stalemate that already features shipping attacks, proxy operations, and economic hardship for ordinary Iranians. A decisive campaign aimed at rapid regime collapse will shorten the overall duration of suffering compared with an open-ended war of intermittent pressure. International supervision of post-war elections can provide a legitimate pathway for Iranian self-determination and reduce the likelihood of prolonged occupation or chaos. Regional partners who have borne the costs of Iranian aggression have a direct interest in a definitive resolution. The alternative — accepting a reconstituted Islamic Republic that retains its nuclear ambitions and proxy terrorist networks — guarantees that Iran’s malign role in the Middle East and beyond will persist and grow.

THE STRATEGIC CHOICE FACING THE TRUMP ADMINISTRATION

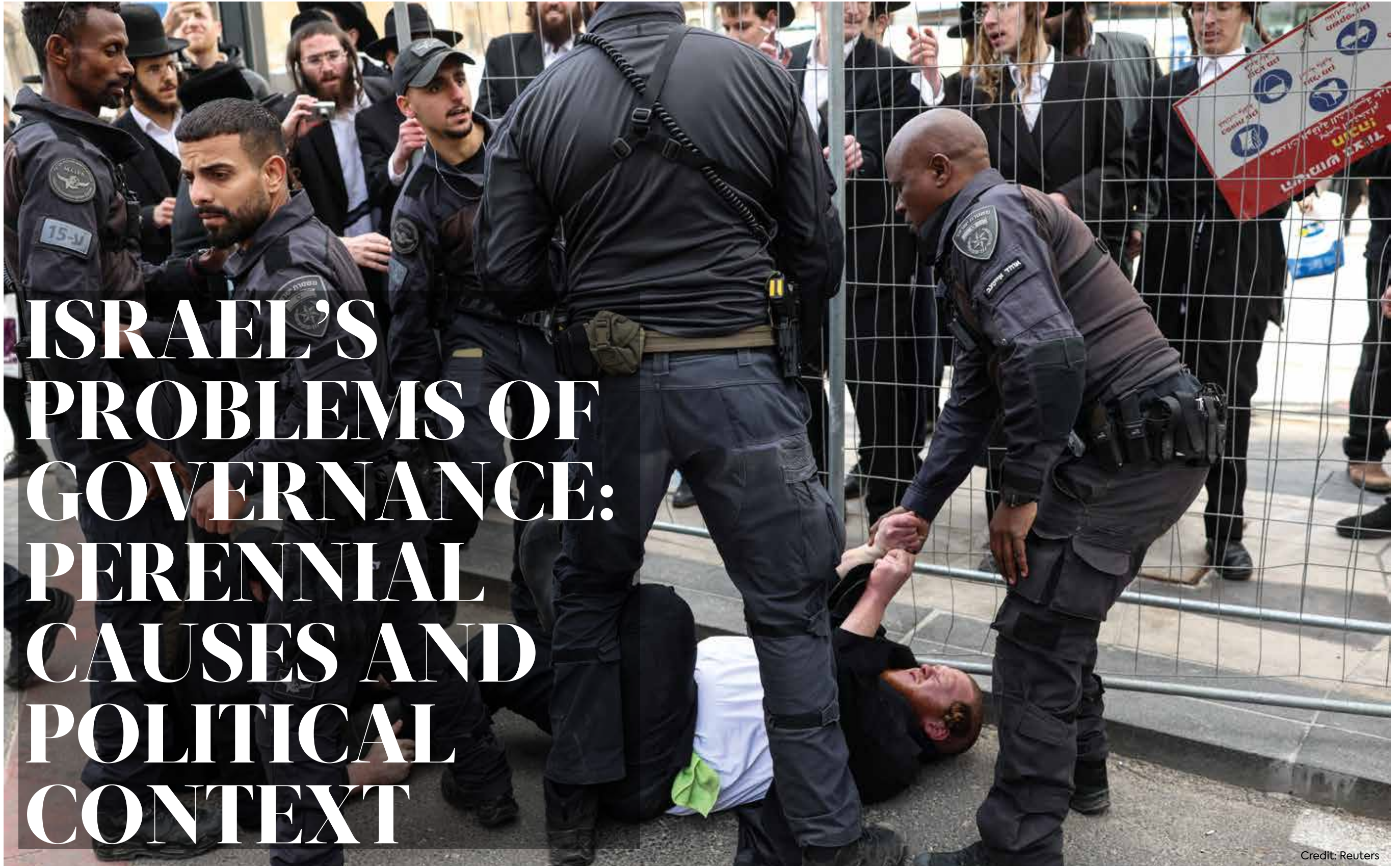
The Trump Administration therefore faces a clear strategic choice. Continued reliance on the current blockade, punctuated by operational

pauses that Iran exploits for military recovery, will not produce victory. Only the combination of sustained economic strangulation and massive, focused air and missile attacks on the regime’s economic and infrastructural foundations can compel its unconditional surrender. Once the political structure of the Islamic Republic collapses, internationally supervised free elections can open the way to a successor government accountable to the Iranian people. This policy aligns military means with the political aim of removing the source of the threat posed by the Islamic Republic. Delay and vacillation will only increase the costs already borne by the United States, its partners, and the Iranian population, and prolong the war indefinitely. The time for decisive action is now. *

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ISRAEL'S PROBLEMS OF GOVERNANCE: PERENNIAL CAUSES AND POLITICAL CONTEXT



Credit: Reuters



by Eran Lerman

The State of Israel is not often associated with the persistent problems of governance that have beset many of its neighbors over the years. With a powerful military, a highly accomplished intelligence community (despite its catastrophic failure is), a well-respected judiciary (albeit under political siege by the present government), a thriving high-tech driven private sector, and fairly strong health and other social services, it has nurtured its image as a functional and resilient state, even under duress. And yet at this time, three patterns of semi-chaotic disruption have emerged – not counting a wildcat strike at the national airport – which point to basic problems now exacerbated by political concerns.

The one which casts the longest shadow, and does threaten to tear the social fabric apart, is the adamant refusal of the Ultra-Orthodox religious leadership to allow the young men of their communities to enlist – although a few thousand do so every year – and the violent demonstrations and road closures caused by their protests against the arrest of draft dodgers.

A second sign of weakening governance, causing considerable damage to the country's already tarnished reputation abroad, is the lawless conduct

of some elements among the hard right – some of them settlers living in makeshift communities in close proximity to Palestinian villages, others come from Jerusalem and elsewhere to lend a hand. Their attacks and provocations have pitted them in a struggle with the IDF forces on the ground, which often fail to impose order.

Third but not least, Arab communities in Israel are increasingly subject to the whim of well-armed gangs, and to a pattern of violence: manslaughter rates continue to escalate, as the result of warfare between crime organization, of vicious family feuds, and of “honor” killings (women murdered by their own families). The authorities are unable to reverse the trend.

While powerful issues of identity and ideology are at play in all three cases, major contributing factors, which are bound to play a role in the 27 October elections, have to do with the partisan politics in the narrower sense of the word. The Ultra-Orthodox parties – Netanyahu's current coalition partners – use their leverage to block the draft, angering those who do serve and see the lives of their children at risk. The nationalist hard right which dominates the coalition – and includes prominent figures within Netanyahu's own Likud party – tends to back the violent elements within the settler community. As for crime in Arab communities, given that their political representatives are deeply opposed to the ruling coalition, there are doubts whether the present government,

and more specifically the present Minister of National (i.e, Internal) Security, are willing or able to muster the resources – financial and institutional – necessary to fight the crime wave in close cooperation with local Arab authorities.

Given the impact on daily life and the hourly news cycle, as well as on moral and identity issues, these themes will be as important as the war and the economy in determining voting patterns. Moreover, even amidst a highly competitive and complicated party rivalry, it is fairly safe to assume that any future Israeli government will be judged by its ability to restore governance on all three fronts.

THE ULTRA-ORTHODOX AND THE DRAFT

Israel's founding father, David Ben-Gurion, was the first to grant an exemption from military service to what he thought would be a relatively small group of Ultra-Orthodox – called in Hebrew Haredim, those who are fearful of The Lord – students of religious studies. Given his modernist, socialist outlook, he probably saw this as a transient phenomenon, a relic of diaspora life soon to be swept away by the vital culture of a re-born nation returning to its land. But they did not dwindle, and with remarkable birth rates just grew apace. By the time Menahem Begin and the Likud came to power in 1977, his political coalition included the Haredi political parties, and the exemption was extended much further.

While morally problematic and economically harmful (to avoid the draft, Haredi young men declare that Torah, religious study, is their profession – and hence cannot legally earn a living in any other, more productive ways), this remains an unsolved problem. Numerous attempts have been made to legislate a solution, after the Supreme Court struck down some overtly discriminatory legislation: but even Netanyahu's present coalition partners, Shas (representing Haredis whose recent origins are fromiyah from Middle Eastern countries) and United Torah Judaism have not been able – at

this particular time – force through laws which would exempt their young men while other segments of Israelis society bear the terrible burdens of a prolonged war. Even those who do not actually study are instructed to resist the draft: service, they are told – in the presence of women! – would corrupt their way of life.

No issue seems to roil emotions (on both sides of the divide) more than this one. Indeed, the Modern Orthodox element of Israeli society – ideologically committed to military service, and bearing a disproportionate part of the war losses and reserve service periods – is increasingly angry in the face of Haredi intransigence. The pain of the last three years made the utter disregard of these communities towards the price paid by other segments of society (which also carry the main burden of economic activity, and hence of taxation) increasingly intolerable, and the opposition parties have adopted this as a rallying cry. All attempts at driving the necessary legislation thus failed, not least because of a group of rebel Members of Knesset from within Likud who refused to vote for what was being proposed.

Thus, in the absence of an exemption law, young Haredi men are liable to be drafted. Some, in fact, do join up: an infantry brigade where practices are adapted to their needs has been created, and others bring their considerable talents to bear on intelligence and IT. The numbers are in the thousands, an indication that there is greater diversity in these communities than meets the eye. But the many who do not show up for service, and vehemently refuse to do so, can occasionally be tracked down and arrested: and when that happens, there are radical groups in the Ultra-Orthodox communities which quickly organize to disrupt daily life, close off main traffic arteries, clash with the police, as well as lay siege to the homes of officers, officials and even, at one point, a Supreme Court Justice. Police reactions have been feeble, and frustrated drivers (and Israel citizens at large) have come to feel that the country as a whole is going off the rails.

EXTREMIST ANTI-PALESTINIAN VIOLENCE

Many reports in recent months have generated the impression – certainly in Western media – that “The Settlers” are on the offensive against their Palestinian neighbors. This is not the case: just as not all Haredi groups block roads and wreak havoc, the great majority of the so-called settlers – Jews who live in areas which came under Israeli control in the Six Day War of June 1967 – are law-abiding citizens and keen to maintain good relations with adjacent Arab villages. But a small segment, encouraged in recent years to move into open area and establish wildcat “farms” (which then gain the support of Finance Minister Betzalel Smotrich, who also hold a position in the Ministry of Defense in charge of affairs in the territories), have made it their practice to clash with the Palestinian locals over grazing areas, olive plantations, or just the sheer right to roam around. Once provocations ensue, regardless of “who started”, they bring violence to bear (sometimes against Israeli and international protesters, and even against the IDF units which try, often belatedly, to intervene).

The result is another spectacle of lawless behavior, often enacted quite deliberately in front of TV cameras, aimed at advertising what the extremists see as their undisputed claim to the entire Land of Israel, as they see it. They have an audience: with the wounds of 7 October 2023 still open, such attitudes towards the Palestinians at large do resonate in significant segments of Israeli society. The IDF and the intelligence community – let alone the Israeli public diplomacy officials struggling against widespread defamation – may castigate such conduct as deeply destructive to Israel’s standing, and as carrying the potential of explosive reactions in the West Bank: but in the heated atmosphere of an election campaign, with right wing politicians catering to the hardline base, it is the perpetrators who often feel they have the backing they need.

Thus, the Minister of Defense took issue with the OC Central Command over the administrative detention of one activist suspected of lawless violence – and then even went so far as to announce on television that he will have the General replaced (which he had no authority to do). As such tensions persist, questions arise as to the rule of law in this context: even US Ambassador Mike Huckabee, no enemy of the settlement project as such, used the term “terrorism” to describe some of these cases.

LAWLESSNESS AND HOMICIDES IN THE ARAB SECTOR

Year by year, the number of homicides among Arab citizens of Israel has been rising, from 230 in 2024 to 252 in 2025 and 196 in the first eight months of 2026 – as the most salient, and shocking, aspect of a terrifying rise in violent crime and the regular use of firearms. Some of the case involved the horrifyingly misnamed “honor killings” – women murdered by members of their own family for what they deemed to be unbecoming behavior. Most of them, however, were men (as well as women and even children – deliberately shot because of their family connections, or the victims of fire aimed at others) killed as part of warfare between criminal gangs and cartels, or murderous feuds and vendettas between clans in the same town. Easy access to weapons – stolen from IDF stocks, or smuggled in (increasingly, by drones) – has made the scourge even worse.

There is a paradox attending what is happening in this significant sector – more than 20% – of Israeli society. In many ways, Arabs have found their place in business, industry, and particularly the medical professions: their standard of living has risen dramatically and so has the level of education. Notably, the incidents of political radicalization and involvement in terrorism have been relatively rare (certainly when compared with Muslim minority communities elsewhere). And yet,

against this significant background, the rampant rise in crime, the power of cartels over aspects of daily life, and the terrible murder rate, far exceeding that of any other sector, all stand out as signifying yet another case of a profound crisis of governance.

Here, too, politics play a role. The parties representing the Arab sector have not been part of governing coalitions – except for a remarkable episode between 2021 and late 2022, when Mansour ‘Abbas supported the “government of change” led by Naftali Bennet and Yair Lapid. Indeed, this period did witness an effort to come to grips with crime in the Arab sector: Abbas is now openly seeks to bring into his list a key Jewish figure – Yoav Segalovich, a former senior police officer, who as Deputy Minister of Internal Security led this effort at the time. In terms of budgets and institutional investment, political clout can make a difference if a major battle is to be fought against the crime families and against the proliferation of firearms.

At present, the Netanyahu government as a whole and certainly the ultra-nationalist Minister of “National” (i.e. Internal) Security, Itamar Ben-Gvir, seem to have a rather limited span of attention when it comes to fighting organized crime or collecting weapons: he is more keen on populist (and popular) measures aimed to make life tougher in jail for those convicted of terrorism – including the novel idea of moats with crocodiles... – then of the thankless job of working with the local municipal authorities on suppressing gangs and offering Arab youth alternative courses.

WHAT LIES AHEAD?

The multi-front war has yet to be brought to a successful end; and with the mixed bag of the economy (strong Shekel, massive investments in Israeli corporations, alongside a painful rise in the cost of living), the problems of governance are bound to be the subject of heated exchanges in the last, punishing weeks of the election campaign. The opposition has taken to calling

the coalition “the draft-dodgers government”; Netanyahu, in response, signaled that he would offer the exemption only to those who truly study, and that he would seek to broaden his base of support and rid himself of the dependence on the Ultra-Orthodox. He has been less specific as to curbing the nationalist extremists – although he did denounce the act of a nationalist MK who in defiance of IDF rules tried to smash a monument to a dead terrorist in the West Bank. As for Arab crime rates, they may become the argument in favor of bringing ‘Abbas and his party into the fold (as Netanyahu himself tried to do in 2021 and failed).

Election results are never easy or safe to foresee, ever more so in Israel today, with complex calculations about the impact of the smaller parties on the outcome making the makeup of the next government even less predictable. Still, there are reasons to believe that the present patched-up coalition will not be there when the dust settles (if it ever does: Israel saw five election cycles because of indeterminate results in recent years): and that the need to deal with each of the problems of governance outlined above will be reflected in the next coalition’s policy guidelines. *

ERAN LERMAN

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DON'T COUNT OUT NETANYAHU

Credit: via Reuters



by Daniel J. Samet

Israelis head to the polls next month for their first parliamentary election since 2022. Polling varies, but many conclude that Prime Minister Benjamin Netanyahu faces an uphill battle to stay in power.

Analysts doubt whether he can pull it off. “Their prime minister is in real political trouble,” writes Eurasia Group President Ian Bremmer of the Israelis. *Haaretz*, an Israeli paper that has long opposed the prime minister, claims that this may be “Netanyahu’s Last Stand.” The eagerness to pen his political obituary is apparent inside and outside the country.

Yet accounts such as these risk getting ahead of themselves. No one should write off Bibi. He’s been winning national elections for a long time and is the most dexterous politician in Israeli history. It’s too soon to trumpet this as his end.

Netanyahu has prevailed in trying political circumstances many times before. In 1996, a much-younger Bibi faced off against the Labor Party’s Shimon Peres on the prime ministerial

ballot (the prime minister was then directly elected). A half-year prior, Prime Minister Yitzhak Rabin was assassinated by an extremist opposed to Oslo Accords. Israelis initially rallied around Peres, who succeeded the slain Rabin, and polls gave him a commanding lead over Netanyahu. It all came to naught. Netanyahu had much better political savvy than Peres, who was a fish out of water that election. Attacks on Peres’ alleged weakness on security connected with voters. Netanyahu won a narrow victory, but it was a victory nonetheless.

Kicked out of power three years later, Netanyahu returned from political purgatory and became prime minister once more in 2009. This time, he had to overcome the mathematics of coalition building. Tzipi Livni’s party, Kadima, one more Knesset seat (28) than Netanyahu’s Likud (27). Judged unlikely to be able to horse-trade effectively enough to form a government, Livni watched Netanyahu receive the mandate to do so. Forty-nine days after the election, the Netanyahu-led government was sworn in and boasted a healthy majority of Knesset members. This was a rude awakening for those who had previously written off Netanyahu.

He would need all the guile he showed in cobbling together the 2009 coalition over his

next 12 years in power. Netanyahu silenced his critics in winning the elections in 2013 and 2015. The 2019 election looked to be a repeat, yet in-fighting on the Right derailed government formation, leading to a second election later that year. Another impasse ensued. A third election, this one in 2020, broke the stalemate. Netanyahu formed a unity government with Benny Gantz. Gantz, it must be said, was no match for Netanyahu in these machinations. The two concluded a deal whereby Netanyahu would first serve as prime minister for 18 months, after which time Gantz would take over. The result? Gantz never became prime minister because the unity government fell apart at the end of the year. This was an astonishing display of political prowess by Netanyahu. He stayed in the premiership for over a decade, consistently outfoxing those wishing to unseat him. Even his bitterest detractors had to credit him for such a feat.

Netanyahu was temporarily toppled in 2021, when rivals Naftali Bennett and Yair Lapid inked a rotation agreement of their one. Like Netanyahu and Gantz’s, theirs was short-lived and precipitated elections the following year. The movie followed a familiar script. Netanyahu cobbled together another coalition and returned to power, where he has been ever since.

Some will say that this year’s elections are different. They’ll cite the fall-out from the October 7 attacks, a veritable albatross for Netanyahu and his government. They’ll point to the ascendance of Gadi Eisenkot, who formerly served as IDF chief of staff and who lost a son during the war in Gaza, as Netanyahu’s main rival for the premiership. They’ll mention divisions between and within right-wing parties threatening to erode their number of seats in the Knesset. They’ll postulate that the Arab bloc may join a non-Netanyahu-led government to ensure that he’s booted from the premiership.

This could all be true. Netanyahu is dealing with significant headwinds this election. At 76, Netanyahu is no longer a young man and may have lost a step or two. His Machiavellian

tactics may have alienated other politicians to the extent that they will no longer cut deals with him.

Even so, if there’s one rule of Israeli politics over the last 30 years, it’s that you don’t count Netanyahu out. He’s been in many jams and has wiggled his way out of each one. Those expecting him to do so again have history on their side. *

DANIEL J. SAMET

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OFER WINTER AND THE NEED TO RESTORE DECISIVE VICTORY TO ISRAEL'S NATIONAL SECURITY DOCTRINE

Reuters/Ronen Zvulun



by Zaki Shalom

When the First Intifada erupted in December 1987, Israel initially treated it as a wave of public disorder that could be suppressed through military force. Defense Minister Yitzhak Rabin adopted a forceful policy, subsequently associated with the controversial phrase “break their bones.”

Yet Rabin, IDF Chief of Staff Dan Shomron, and the senior security establishment gradually recognized that Israel was confronting a broad popular uprising rather than a series of localized disturbances. The military could reduce the violence and temporarily restore order, but it could not eliminate the political, national, and social roots of the uprising. A political response would therefore be required alongside military action.

This was an important development in Israel’s national security thinking. It strengthened the valid recognition that military power has limitations and that not every political challenge can be resolved on the battlefield.

Over time, however, this insight expanded far beyond its original context. Israel’s political and security establishments increasingly settled for managing conflicts, preserving temporary deterrence, reducing friction, and obtaining

periods of calm—instead of pursuing a decisive outcome when circumstances made one both possible and necessary.

There is nothing inherently wrong with restraint. A responsible government must consider political, legal, economic, and international constraints, as well as the risks to soldiers and civilians. Not every enemy can be destroyed, and not every confrontation can end in absolute victory. Yet calculated restraint is not the same as abandoning in advance the aspiration to prevail.

Decisive victory does not necessarily mean the enemy’s complete destruction. It means creating a reality in which the enemy loses the ability to continue fighting in the same way, cannot quickly rebuild the capacity to threaten Israel again, and is compelled to confront fundamentally different strategic circumstances. A military decision cannot replace a political settlement, but without a sufficiently decisive military outcome, any settlement may rest on fragile foundations.

In the decades preceding October 7, Israel increasingly assumed that time was on its side. Its growing military, technological, and economic superiority would persuade its enemies that war was futile. They could be deterred rather than defeated, while a combination of threats, economic incentives, and limited military responses would preserve prolonged periods of relative calm.

This approach reached its most dangerous expression in Israel’s policy toward Hamas. Israel permitted the transfer of Qatari funds into Gaza and granted economic concessions, believing that improved living conditions and the responsibilities of territorial rule would give Hamas a strong interest in avoiding escalation.

At the same time, Israel tolerated violence along the border, incendiary balloons, and periodic rounds of rocket fire. It responded, sometimes forcefully, but generally refrained from taking action intended to transform the strategic reality in Gaza. Each temporary period of calm was interpreted as proof that deterrence had been restored.

The catastrophe of October 7, 2023 exposed the failure of this assumption. Hamas used the years of relative calm not merely to govern Gaza, but to build its military strength, prepare an extensive combat infrastructure, and plan a murderous assault. What Israel understood as mutual restraint was treated by Hamas as an opportunity to prepare for the next war.

The IDF has since achieved significant operational successes and severely damaged Hamas, Hezbollah, and important Iranian capabilities. Nevertheless, Israel has not always succeeded in converting military achievements into clear strategic and political outcomes. More troubling is the impression that the very concept of decisive victory has almost disappeared from Israel’s national security discourse or is dismissed as an outdated idea.

It is against this background that Brigadier General (res.) Ofer Winter’s entry into political life assumes particular importance. Winter represents a command ethos centered on initiative, offensive action, operational ingenuity, and the pursuit of victory.

He recalls Moshe Dayan’s description of the commanders Israel required: “It is better to struggle with spirited horses when the problem is how to rein them in than to prod and spur oxen that refuse to move.”

Winter appears to belong to the first category. Throughout his military career, he

developed a reputation as a commander who did not merely react to events but sought to shape them. His outlook does not rest on containing the enemy indefinitely or repeatedly pushing it back for limited periods. It emphasizes bringing the enemy to a point at which its defeat is clear and unmistakable.

In this respect, Winter also resembles Rafael Eitan—Raful—whose military outlook placed victory at the center of the army’s purpose and rejected convoluted doctrines that could obscure the commander’s fundamental responsibility.

During Israel’s early decades, decisive victory stood at the heart of its military doctrine. Given its small territory, lack of strategic depth, and vulnerable population, Israel understood that it could not sustain a prolonged defensive war. It had to transfer the fighting rapidly into enemy territory and deprive its adversary of either the ability or the will to continue.

The nature of Israel’s enemies has since changed. Conventional wars against regular armies have largely given way to prolonged confrontations with terrorist and guerrilla organizations, supported by regional powers. But this transformation does not eliminate the need for decisive victory. It requires Israel to redefine what decisive victory means against Hamas, Hezbollah, and Iran, and to develop the military and political instruments necessary to achieve it.

Winter’s entry into politics could therefore make an important contribution to deliberations around the cabinet table. Israel needs senior political figures willing to demand bold military plans, question the culture of containment and postponement, and challenge the automatic assertion that victory is impossible.

His significance lies not only in the specific policies he may advocate, but also in the military ethos he may introduce into political decision-making: initiative rather than passivity, shaping events rather than responding to them, and treating victory as an operational objective rather than an embarrassing or unrealistic slogan.

Yet this approach requires an equally important qualification. In a democratic state, the military executes policy; it does not determine it. The elected political leadership must define the objectives of war, weigh the full range of national interests, and bear responsibility for the consequences. At times, it should encourage military daring; at other times, it must restrain it.

Israel needs “spirited horses,” but it also needs political leaders who know where those horses should go, when they should be reined in, and what political reality should follow a military victory. Operational aggressiveness without a clearly defined political objective can produce impressive battlefield achievements without lasting strategic success.

Winter must also recognize the limitations of his experience. Military expertise, personal courage, and command ability do not automatically confer a deep understanding of constitutional law, economics, education, healthcare, or social policy. There is no shame in acknowledging that these fields require further study. Such humility would strengthen rather than weaken his public credibility.

Winter’s most valuable initial contribution would be to restore the concepts of initiative, daring, victory, and decisive action to the center of Israel’s political and security discourse. If he can translate his military experience into a responsible political doctrine, accept the unequivocal authority of the elected civilian leadership, and surround himself with experts in fields beyond his experience, his entry into politics could prove highly significant.

After October 7, Israel cannot return to a policy of purchasing illusory calm and repeatedly postponing decisive action. Restraint will sometimes remain essential, and military force must never become an end in itself. But neither negotiations nor economic concessions can substitute for eliminating an intolerable threat.

If Ofer Winter helps restore this balance to Israeli strategic thinking, his entry into politics

will be more than a personal development. It may help reshape Israel’s military doctrine and its understanding of what is required to defend the country in the years ahead. *

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U.S. billionaire venture capitalist Peter Thiel arrives for a meeting with Argentine President Javier Milei at the Casa Rosada presidential palace in Buenos Aires, Argentina, April 23, 2026. Reuters/Matias Baglietto

MILEI, THE TECH BROS AND AI DREAMS



by Richard M. Sanders

In April, Argentines were surprised to learn that Peter Thiel, co-founder of data analytics giant Palantir and a fierce opponent of the regulation of artificial intelligence (AI), was visiting Buenos Aires, and had met with President Javier Milei. Another surprise came when, following Thiel's visit, Milei published an article in the *Financial Times* stating that he had submitted legislation to jumpstart AI investment in Argentina by creating a new legal category, that of the "non-human corporation." The proposal provoked a sharp response from international public intellectual Yuval Noah Harari as well as from within Argentina itself where it was linked to the two men's shared libertarian ideology.

Milei has long enjoyed hobnobbing with the masters of Silicon Valley. But is his aim of an AI-powered renaissance more than just a techno-utopian pipe dream? Getting Argentina's fractious Congress to pass his bill will be challenging. And if his near-term goal is fostering data center construction, the question arises of how they will be powered, given Argentina's rickety electrical grid. Artificial intelligence may indeed have a role in Argentina's future, but its much-hyped prospects cannot obscure the reality that Milei's

main aim must be leading his country through what is still a painful, at best half-finished, reform program.

A VISIT AND AN OP-ED...

In late April Argentines learned that Peter Thiel, the tech investor and one of the founders of data analytics firm Palantir Technologies was visiting Buenos Aires and even had purchased a home there. It was speculated that Thiel's interest in Argentina was motivated by fears of some coming apocalyptic event that he could escape by moving to this far southern location. It was also suggested that he felt in tune with Milei's libertarianism and saw him as likely to make Argentina a low tax haven at a time when some U.S. jurisdictions are contemplating an unwelcome "billionaire's tax."

Thiel met with Milei for a cordial conversation which the latter praised, saying that "he (Thiel) is an anarcho-capitalist as am I philosophically." Thiel maintained a high profile while in Argentina, including attending a soccer match, participating in a chess tournament, and reportedly purchasing a house worth 12 million dollars. However he does not appear have yet sought residency; he earlier acquired citizenship in another southern hemisphere jurisdiction, New Zealand.

While the Argentine public was still absorbing the idea of Thiel possibly moving there, on June 4 Milei published an op-ed in

the *Financial Times*, a key outlet for the global business elite, about making his country a force in AI through radical deregulation. (Given that AI figures heavily in Thiel's enterprises and he has argued that its regulation could have a "global totalitarian character," local observers linked the visit and the article.)

Milei expressed concern that recent technologies such as blockchain had become the victims of "precisely the wrong legal architecture." He argued that this is especially worrying for AI as "we are on the threshold of an era in which artificial intelligence will free us from the constraints of the human brain, pushing productivity beyond our wildest dreams," an era which must not be hindered by "the deadly hand of premature and poorly understood regulation."

Instead, he argued, "companies run by new technologies such as AI agents" require that same limited liability protection "that has underpinned capitalism for four centuries." To that end, he announced that he had submitted draft legislation to Argentina's Congress which includes a commitment to keep AI unregulated. But beyond that, it would create a new legal category, the "non-human corporation... entities operated by AI agents or robots... systems (that) exercise independent judgment in unpredictable environments." They must, in Milei's view, be given limited liability as it is "not a luxury for such entities; it is a precondition for their existence."

... PROVOKE REACTIONS

Milei's proposal immediately caused controversy. Yuval Noah Harari, the Oxford-educated Israeli thinker and author of the recently published *Nexus: A Brief History of Information Networks from the Stone Age to AI*, wrote a response in the *Financial Times* entitled "We must not grant AI agents legal personhood." He warned of a world in which "unlike traditional corporations... (these entities will be) buying selling, hiring, investing,

litigating, and donating" without human participation. He asked what would deter a "non-human corporation" from undesirable or even illegal activity as its powerful capabilities could be deployed without the ultimate sanction that human CEOs face of being tried and sent to prison. He raised the specter of an "AI state—a country whose people could in effect be ruled by non-human corporations."

Locally, Milei's article, on top of Thiel's visit, produced a sharp reaction from Elisa Carrió, leader of the Civic Coalition, a political party centered on good government and combating corruption. In an open letter she expressed deep concern that Argentina was becoming "the chosen place for a social experiment with terrible consequences for human freedom, thought, expression, dignified life, privacy and freedom of choice arising from the non-regulation of artificial intelligence." She saw Milei as promoting the "complete private totalitarianism of one corporation: that of Peter Thiel."

Carrió called for the rejection of "the president's irrational caprice" which she characterized as part of the "so-called dark enlightenment"—a term often used to describe reactionary ideologues such as Curtis Yarvin, whose thinking had some purchase among the Silicon Valley elite. Yarvin disparages conventional democracy which he describes as dominated by the "cathedral" of academic, media and bureaucratic figures and looks towards an efficient, authoritarian government by a technological elite.

Thiel seemingly has affinities with this thinking. He said in 2009: "I no longer believe that freedom and democracy are compatible" and has put money into "Prospera," a controversial privately governed community in Honduras, now embroiled in lawsuits. (And in a theological excursion, he has even associated efforts to regulate AI with the potential rise of the Antichrist.) But Milei does seem to be a more conventional, if deeply committed libertarian, who takes his

cue from such “Austrian school” economic thinkers as Friedrich Hayek and Ludwig von Mises, although his contempt for Argentina’s establishment, which he terms “the caste,” does parallel the alleged sins of “the cathedral” and his political style, which is high on abusive rhetoric, can have an authoritarian ring to it.

In any event, Milei clearly is attracted to the promise of AI’s transformative role. In addition to cultivating Thiel, he has visited the United States, meeting with such industry leaders as Tim Cook (Apple), Mark Zuckerberg (Meta), Sam Altman (OpenAI), and Sundar Pichai (Google). He has also developed a rapport with Elon Musk, centered on their shared interest in shrinking government, as was demonstrated when he gifted Musk with a chainsaw, the symbol of his anti-state campaign.

READY FOR A TECH BOOM?

With or without Milei’s “non-human corporation,” can Argentina become a pole for technological investment? Argentina has one of Latin America’s most highly educated populations, despite the damage to its to its university system from years of economic and political chaos. Particularly notable is the Balseiro Institute in Bariloche which trains physicists, as well as atomic, mechanical and telecommunications engineers; thus Argentina has some capacity to foster the necessary human capital for a significant AI-related tech sector.

And on the narrower, if more immediate goal of attracting data centers, Milei has gained some interest from global investors. (There are currently a mere 29 data centers in Argentina, compared with 5427 in the United States.) Argentina is participating in the so-called “Stargate Project,” a massive effort to build out AI capacity led by OpenAI, together with Japan’s SoftBank, with participation from a range of other major tech firms; early into his second term Trump announced official U.S. government support for this effort.

OpenAI, together with an Argentine partner, has announced the creation of “Stargate Argentina,” a planned \$25 billion investment in data center construction in Patagonia, where cold weather could mitigate these centers’ high demand for air conditioning. On a smaller scale, cloud-based software firm Salesforce has announced a five-year, \$500 million planned investment in Argentine AI capacity. And in June, Milei announced Argentine participation in the U.S. government-led “Pax Silica” initiative to secure supply chains for advanced technologies such as artificial intelligence-related infrastructure, semiconductors and critical minerals.

IT’S NOT SO EASY

But there is a huge difference between announcements and actual investment. Globally there are questions as to whether the AI boom is really a bubble at least over the short term. And the Stargate Project seems to have over-promised, as it confronts the cost of electricity to power data centers, leading, for instance, to a pause in construction in the United Kingdom.

This is sure to be an issue in Argentina where the power grid barely provides for existing needs. Argentina’s untapped wind power potential on its bleak southern plains may be an option. Milei has also shown enthusiasm for the emerging technology of small modular nuclear reactors. However, while Argentina has experience with nuclear energy, having built two existing large nuclear power plants, the head of the state atomic energy enterprise, physicist and Harvard-trained economist Demián Reidel, a close associate of Milei who had had a role in introducing him to American technology leaders, has had to resign amidst a corruption scandal.

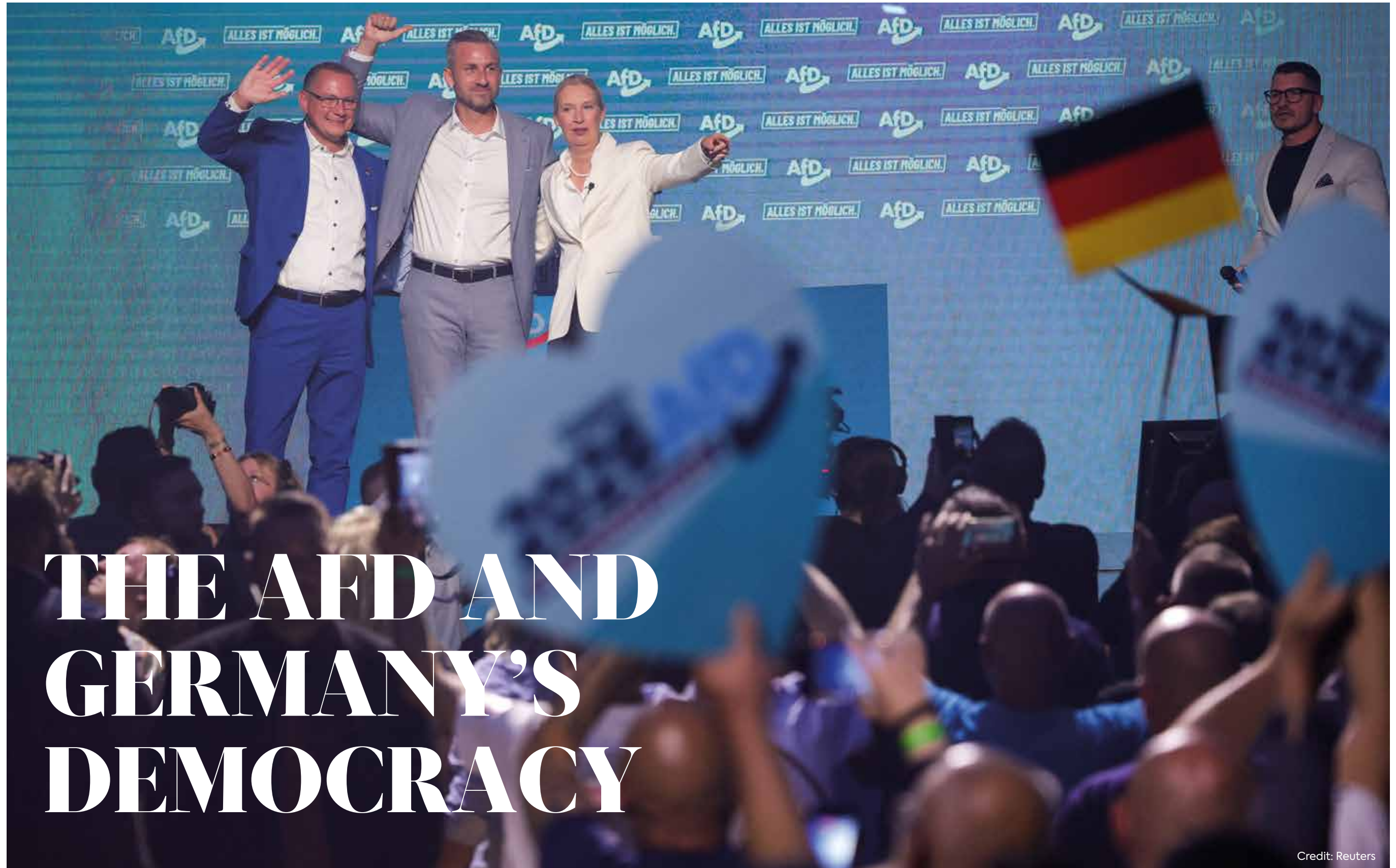
Argentina’s oil and gas sector, which is having its own boom as vast shale deposits are beginning to be exploited at scale, could also become a source of power for data centers, although with an oil pipeline to the Atlantic

coast nearing completion and gas pipelines under consideration, investors seem oriented towards conquering international markets. And in addition to requiring immense quantities of electrical power, data center development will also need water, which could be hard to find on the dry territory of Argentina’s south. (Water became a sensitive issue when Milei pushed through legislation loosening restrictions on mining operations near the Andean glaciers.)

Milei may be right to have his eye on AI, but he will need to avoid confusing the pleasure of associating with this new breed of tech titans and sharing their libertarian visions with the necessary hardheaded analysis of the sector’s costs and benefits. He has been engaged in a tough economic reform program, and at least to some extent has managed to convince Argentines of the truth of the saying, much beloved among libertarians, that “there’s no such thing as a free lunch” and that the path to recovering the standard of living which the country once enjoyed will be arduous. He will do his country no favor by getting sidetracked by fantasies of AI-fueled shortcuts. *

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Credit: Reuters



by Wolfgang Pordzik

The German left-leaning weekly *Der Spiegel* recently carried a mugshot of Ulrich Siegmund on its cover page with the caption “The Most Dangerous Man in Germany”. Campaigning as the “happy warrior” for the hard-right populist AfD party (Alternative fuer Deutschland) in the state of Saxony-Anhalt, Siegmund cheerfully autographed the *Spiegel* cover, while thousands of his supporters lined up to get a copy. Predictably, the attempt to demonize backfired, almost every second voter cast the ballot for Sigmund. His decisive victory at the polls continues to shock the political establishment in Berlin. For months, the media had cast the state election in Sachsen-Anhalt as a “fateful election” with “Germany’s democracy at stake”. Comparisons to the dying days of the Weimar Republic fueled appeals to “save our democracy”. Even cool-headed political scientists asked aloud whether Germany’s “shipwreck of democracy” could still be averted.

Elections in Germany’s smaller states are usually of secondary consequence; Saxony-Anhalt proved the exception. It is a small,

landlocked state of some 2.2 million people, sparsely populated, demographically aging, economically strained, and its infrastructure crumbling. Only after German unification in 1990, Saxony-Anhalt regained its status as one of Germany’s 16 states. Five centuries ago Saxony-Anhalt was the cradle of the Reformation – sparking monumental political turmoil – and bloodshed – in Germany and Europe. Martin Luther lived, preached, and was buried in Wittenberg, a sleepy university town in Saxony-Anhalt. Reportedly, in 1517 he posted his 95 “Reform Theses” at the door of the Castle Church in Wittenberg. This past Sunday its citizens turned out in extraordinary numbers—a record 77 %—to choose their next legislature. Will the AfD’s landslide victory in Saxony-Anhalt once again set off a fundamental realignment of German, and perhaps European, politics?

The AfD was founded in 2013, at first as a conservative, economically neoliberal protest against the Euro and the European Union’s financial-rescue packages, above all for Greece. Its name was no accident: “Alternative für Deutschland” was meant to rebuke Chancellor Angela Merkel’s habitual insistence that her policies were “alternativlos” (without alternative). From the outset the Berlin establishment mocked the party and

branded it a danger to German democracy. In September 2013, the young AfD lost the federal elections, winning only 4.7% with no seats in the Bundestag (federal parliament). Then the refugee crisis of 2015 recast German politics entirely. The Merkel government’s decision to admit large numbers of asylum seekers and refugees boosted the AfD to rapid nationwide growth. The “open-border policy” – embraced by Merkel, her CDU, all center-left parties, and much of civil society as a “moral imperative” – became fertile ground for populist grievance. Slogans like “We are the people” and “We want our country back” resonated first across the formerly communist eastern region of Germany.

The breakthrough came in the federal election of February 2025. With Alice Weidel as its candidate for chancellor, the AfD took 20.8 % – almost exactly double its 2021 share – and 152 seats, making it the second-largest caucus in the Bundestag (federal parliament), only behind the governing CDU/CSU group. Today nationwide the AfD polls between 25-30%. The AfD drew heavily on working-class voters in the industrial Ruhr region in the west, at the SPD’s expense; this past Sunday in Saxony-Anhalt the CDU alone shed nearly 100,000 votes to it. The AfD party has, in short, matured into a genuine nationwide catch-all people’s party, with a substantial lower-middle-class and blue-collar base.

The AfD has been transformed in the process. Rivalry and infighting over its policy direction produced a party opposed to immigration, prevailing asylum practice, and multiculturalism – and, more broadly, to what it decries as the erosion of “German identity” (Ueberfremdung). Its program calls for resuming Russian energy imports and lifting sanctions, opposes open-ended military aid to Ukraine, rejects the central pillars of climate policy, and favors less integration within the European Union (EU). It has cultivated a markedly more Russia-friendly foreign policy, mixed with a distancing from NATO, than any establishment party. And there is certainly no denying that neo-Nazis, racists, and homophobes have found a home in its ranks.

The party’s harder extremist edge came into full view in Thuringia in 2024, where – under Björn Höcke, whom a German court has ruled may lawfully be called a fascist, as a “value judgment grounded in fact” – it took 32.8 % and became, for the first time, the strongest party in a German state election. This past Sunday in Saxony-Anhalt it went further still, posting its best state result to date. The AfD candidate, Ulrich Siegmund, is likely to become the next Minister-President of Saxony-Anhalt.

So, what happened on Sunday? The AfD doubled its vote to some 44 %, while the CDU – the party of Chancellor Friedrich Merz – was roughly halved, to about 17 %. Far behind trailed the SPD and the Greens at around 9% apiece, the post-communist Left (Die Linke) at a similar level, and the BSW just above the 5% threshold. Forming a government in Magdeburg, the state capital, will take time: every other party has sworn never to cooperate with the AfD, an organization classified as “extremist right-wing” by the Office for the Protection of the Constitution, Germany’s domestic intelligence service.

Is German democracy at risk? To the other parties, the largely center-left civil society, and much of the media, the answer is an emphatic yes. Yet their prescription can be summed up to boycotting and isolating the AfD while expanding the welfare state still further. The leadership of the CDU is still enlisted in that front. The party that dominated West German politics for decades, starting with Konrad Adenauer, resolved formally in 2018 to reject “any coalition or comparable cooperation with the AfD.” Die Linke, heir to East Germany’s communist party, was later added to the list of “untouchables”. Upholding the Brandmauer (firewall) has become official doctrine for the CDU/CSU and every party of the center-left. The refrain “We must not repeat the mistakes of Weimar; we must confront fascists early; defending democracy is a civic duty” now serves as the rationale for shunning the AfD.

And a boycott it has been. Despite its 152 seats, the AfD has been denied every position

of consequence in the Bundestag – no vice-president, no committee chairs – and, on a personal level, its members are shut out of most social occasions, down to the parliamentary soccer teams. For any establishment figure, merely being seen “having a coffee and chatting with an AfD member” invites, at the very least, a social-media firestorm. Germans call it a shitstorm.

No issue has polarized the German public quite like the debate about the wisdom and utility of the Brandmauer. That it has already been breached in practice, time and again, is a reality its defenders often prefer to ignore. In numerous small communities and counties, elected AfD office holders have participated in setting local policies, by and large accepted by the traditional parties. Moreover, in the neighboring states of Thuringia (Erfurt, Weimar) and Saxony (Dresden) both CDU Minister Presidents could only form minority governments. Short of forming a coalition, the AfD has been invited to participate in a “consultative mechanism” to develop policies.

Now the overriding urgent question is how to deal with the smashing success of the AfD in Saxony-Anhalt, and the drastic decline of the traditional parties. True, Saxony-Anhalt, with its 1.7 million voters, is not the center of the world, but what chancellor and party leader Merz labeled “the worst defeat in the party’s history” is an unmistakably shrill alarm signal. Moreover, as the election analysis illustrated, the CDU has lost its “competence advantage” to the AfD in every policy field, including economics and national security.

Fortunately, the chorus of voices within the CDU camp rejecting the strict adherence to the “Brandmauer doctrine” is growing. Treating a sizable political opponent like a leper only reinforces a siege mentality. The calls for bans instead of political argument, the refusal to observe the parliamentary rules of the game, the exclusion of candidates for municipal offices – all these moves were mistakes that contributed to the AfD’s radicalization, and

also success. “Behind the Brandmauer you can promise anything”, says Christian Stecker, a political scientist at the Technical University in Darmstadt. “It protects them (the AfD) from the disappointment that accountability in a democracy implies”. And “anyone still talking about firewalls has not recognized the signs of the times,” added Michael Kretschmer, CDU Minister President of Saxony, recently.

A leading voice among several intellectuals is Andreas Roedder, professor of contemporary history at Mainz University. He is a CDU member who has helped draft the CDU’s platform and one of the prominent skeptics of the “Brandmauer” framing. Roedder also heads R21, a centrist think tank platform, advocating political reform proposals across the board.

He outright rejects the term “Brandmauer” as emotionally overwrought, implying an “all or nothing” firestorm is imminent. Instead, he prefers cool headed language dealing with right-wing populists and most importantly, addressing of real political problems voiced by roughly one third of the German electorate. Roedder is not arguing for cooperation with the AfD. He insists the CDU must clearly distinguish itself from right-wing populists – but he thinks the “firewall” rhetoric is politically clumsy and indiscriminately lumping together the 25% plus of German voters leaning AfD as quasi- or real Nazis. His call for a change in strategy is convincing: the Brandmauer has pushed increasing numbers of voters away – rather than winning them back.

His alternative can be called “red lines instead of firewalls”. Rather than a Brandmauer, Roedder suggests substantive red lines drawn between what is legitimate and what is not a legitimate policy proposal. Roedder defines those red lines among others: human dignity, protection of democratic institutions, and the rule of law. These principles must never be up for negotiation, nor issues like Antisemitism, Holocaust denial or debates about history initiated only to break taboos for propaganda purposes. All other policy issues, he argues, the

CDU should engage in with its own answers on migration, climate, gender policy – instead of ceding those topics to the AfD by refusing to touch them. Underlying Roeder’s proposals is his broader thesis that Germany’s polarization stems in part from a “green-red cultural hegemony” that has stigmatized legitimate conservative positions as far-right, and often as racist. The mature and civil response should be to democratically reintegrate that space as a perfectly legitimate “right-of-center” – rather than demeaning and abandoning it to radicals.

At the core of the German democracy’s dilemma lies the fact that for more than a decade two thirds of the German electorate have been voting center-right. Yet, in response the voters have experienced only governments on the center-left. That’s why large numbers of Germans found their way to the AfD – from all strands of society, in east and west. The Brandmauer doctrine so far has trapped the CDU into compromising its own genuine policy positions, made the CDU the prisoner of forming coalitions only with the left whose own support has become smaller and smaller. Yes, the *ECONOMIST* correctly observed: “The AfD is among the more extreme of Europe’s populist outfits, many of which shun its company. It flirts with racism and Nazi imagery, has sympathy for Vladimir Putin and harbors former neo-Nazis in its ranks. Its boorish behavior demeans parliaments”. But those who believe that Germany finds herself again in the year 1932, and perceive the AfD as some reemergence of the NAZI party, know very little about 1932. Andreas Roedder: “To this day the AfD lacks key characteristics of the Nazis: the Führer principle, paramilitary violence, belief in a totalitarian state. Whether the party is substantially unconstitutional and anti-democratic – claimed time and again by opponents – remains an open question, untested by the Federal Constitutional Court.”

In any event, the Brandmauer has failed to arrest the AfD’s rise. Within the next few months two more state elections in Mecklenburg-

Vorpommern and Berlin are likely to produce comparable results: the AfD will again grow. Chancellor Merz’ popularity has hit bottom. More than 80% of Germans are dissatisfied with his performance governing with his CDU/SPD coalition. Replacing him would serve no purpose, nobody will be able to reign in the AfD. Only a substantial tangible political course correction can do the job. Minority governments with changing majorities may well be the least bad option. *

— WOLFGANG PORDZIK

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Israeli and Indian national flags fly at Haifa Port, in Haifa, Israel July 24, 2022. Credit: Reuters/Amir Cohen



BEYOND DEFENSE: THE STRATEGIC CASE FOR AN INDIA- ISRAEL INDUSTRIAL PARTNERSHIP



by Dr. Yashwant Singh

The India-Israel relationship is conventionally narrated through defence sales, intelligence sharing, and agricultural technology transfer. This framing, while accurate, is incomplete. It obscures a more consequential possibility: that the two countries' most durable strategic convergence may lie in co-developing the technologies that will define 21st-century manufacturing: heavy electrical equipment, industrial automation, and robotics. Unlike defence cooperation, which is transactional and bounded by procurement cycles, an industrial partnership of this kind would embed itself in supply chains, capital flows, and workforce ecosystems on both sides, making it structurally harder to unwind and therefore more strategically valuable.

THE GEOECONOMIC BACKDROP

The post-pandemic and post-2022 geopolitical environment has converted what were once ordinary industrial inputs

(semiconductors, robotics, grid equipment, industrial software) into instruments of statecraft. Governments are no longer optimizing supply chains for cost alone; they are optimizing for resilience and trusted partnership. For example, a recent India's Finance Ministry review warned that rapid advances in AI, geopolitical tensions, and supply chain weaponization pose growing risks to economic stability. It urged faster policy action and structural reforms to strengthen resilience and sustain long-term growth. This is the logic behind "friend-shoring" and behind India's own production-linked incentive (PLI schemes) architecture across electronics, telecom equipment, and advanced manufacturing.

Within this environment, India and Israel have been deliberately deepening the institutional scaffolding for economic convergence, even as regional turbulence has complicated the picture. The two governments signed a Bilateral Investment Agreement in September 2025 to protect and encourage mutual investment flows, and in November 2025 they signed the Terms of Reference to begin negotiating a comprehensive Free Trade Agreement, talks that continued into 2026, with Prime Minister Modi publicly urging

early conclusion during a Knesset address. In January 2026, the State Bank of India moved to enable rupee-based trade settlement with Israel, a modest but symbolically important step toward reducing dollar dependence in bilateral commerce. A renewed India-Israel Industrial R&D and Innovation Fund (I4F), running through 2027, continues to underwrite joint technology projects.

Yet the relationship is not frictionless. Bilateral merchandise trade (excluding defence) fell from roughly \$6.53 billion in FY2023-24 to about \$3.75 billion in FY2024-25, a decline both governments attribute to regional security disruptions and shipping-route interference following the escalation of conflict in the Middle East. Some international investment funds have also reduced exposure to Israeli assets over the Gaza war. A grounded assessment of the partnership's potential must hold both facts together: institutional momentum is real, but geopolitical volatility is a live constraint, not a footnote.

INDIA'S MANUFACTURING BASE: SCALE WITHOUT DEPTH

India's industrial credentials in heavy electrical equipment are already substantial. Bharat Heavy Electricals Limited, Siemens India, ABB India, CG Power, Hitachi Energy India, Schneider Electric India, Larsen & Toubro, Havells, and Bharat Electronics Limited collectively give India one of the world's larger domestic electrical equipment manufacturing bases, supported by an extensive tier of component suppliers.

The automation and robotics layer tells a more revealing story. India's industrial robotics market was valued at roughly \$3.3-4.9 billion in 2025 depending on methodology, with most forecasts projecting 10-14% annual growth through the early 2030s; the broader industrial automation market is similarly projected to grow from roughly \$3.6 billion to well over \$10 billion by the mid-2030s. India recorded a

record number of industrial robot installations in 2023, ranking among the world's top ten markets and, per the International Federation of Robotics, among the leaders in South and Southeast Asia for robot density growth. The automotive and electronics sectors account for the bulk of this demand.

The structural weakness is that this growth remains substantially import-led. India continues to depend heavily on Japan, Germany, and South Korea for finished robots, and even more heavily on foreign providers for the higher-value layers sitting above the mechanical hardware: machine vision systems, servo drives, programmable automation controllers, industrial AI software, and cybersecurity for operational technology. Indian manufacturing excels at scale, assembly, and increasingly at mid-tier component production; it has not yet built a comparable base in the software- and sensing-intensive layers that determine whether a factory is merely automated or genuinely intelligent.

ISRAEL'S INNOVATION BASE: DEPTH WITHOUT SCALE

Israel's position is close to the inverse. Its Industry 4.0 ecosystem includes well over two hundred companies working in operations optimization, machine vision, predictive maintenance, robotics, and industrial cybersecurity, a sector that has attracted sustained venture investment over the past decade. Israeli firms such as 3D Signals have demonstrated measurable factory-floor impact, reportedly cutting unplanned downtime by digitizing production-line monitoring; firms like RGo Robotics, Kitov, and Frisimos work respectively on robotic perception, AI-based visual inspection, and automated cable assembly. Industrial exports account for the large majority of Israel's total goods exports, reflecting an economy oriented toward high-value, technology-intensive production rather than volume manufacturing.

What Israel lacks is exactly what India has in abundance: cheap industrial land, a mass manufacturing workforce, and a domestic market large enough to let a technology mature through repeated deployment. Israeli firms routinely reach a ceiling where a genuinely disruptive sensing or software innovation cannot be manufactured, deployed, and iterated at the scale needed to compete globally against East Asian and European incumbents.

THE COMPLEMENTARITY ARGUMENT

This is the crux of the case for convergence: India supplies scale, deployment environments, and manufacturing depth; Israel supplies the software, sensing, and AI layers that convert conventional equipment into intelligent infrastructure. Neither country's comparative advantage substitutes for the other's, they compound. A jointly developed transformer or switchgear system embedding Israeli predictive-diagnostics software and manufactured at Indian scale is a more competitive global product than either country could build alone, and the resulting intellectual property, unlike a simple licensing arrangement, would be genuinely co-owned.

This logic applies with particular force to three sectors:

* **Heavy electrical equipment.** India's grid modernization and renewable energy integration programs require increasingly sophisticated protection systems, digital substations, and predictive maintenance platforms, precisely the layer where Israeli industrial-AI and sensor firms have demonstrated strength, and precisely the layer that remains dominated by non-Indian multinationals within India's own equipment industry.

* **Industrial automation.** As Indian manufacturers face rising wage costs and export-quality certification pressure, demand is shifting from basic assembly-line automation toward AI-driven, sensor-rich systems. Co-developed

platforms, combining Israeli machine vision and control software with Indian manufacturing and integration capacity, could also seed a domestic component ecosystem in servo motors, controllers, and industrial communication hardware that currently barely exists.

* **Robotics.** The next generation of industrial robots will be defined less by mechanical engineering than by perception and autonomous decision-making, which is Israel's core competency, while India offers deployment scale across manufacturing, logistics, agriculture, and infrastructure inspection that no Israeli firm could access domestically. Several dual-use applications (autonomous inspection, hazardous-environment robotics) also carry security value for both states.

INSTITUTIONAL ARCHITECTURE AND ITS LIMITS

The two governments already possess usable instruments: the I4F fund for joint R&D, the 2025 Bilateral Investment Agreement, and an FTA process now in active negotiation. These should be extended with sector-specific mechanisms, a dedicated industrial automation and robotics innovation fund, joint standards and certification frameworks, and manufacturing clusters within India's industrial corridors that formally partner with Israeli research institutions and Technion- or Tel Aviv University-linked startups.

The India-Middle East-Europe Economic Corridor is often invoked as the connective infrastructure for such cooperation, and it retains genuine long-term logic, reducing logistics costs and creating an alternative to Suez Canal chokepoints. But an honest appraisal must note that, as of 2026, IMEC remains in a feasibility and planning phase, with no binding financing framework, no firm construction timeline for the corridor as a whole, and its central precondition, durable Israel-Gulf normalization, significantly complicated by the ongoing Gaza conflict. Individual national

components (Gulf port and rail projects) are proceeding independently of the corridor concept. Policymakers should treat IMEC as a favourable but non-guaranteed tailwind, not as the foundation on which industrial cooperation depends. The India-Israel industrial case stands on its own economic logic even if the corridor stalls.

REALISING THE NEXT PHASE OF STRATEGIC PARTNERSHIP

The strongest partnerships are rarely sustained by defence procurement alone; they endure when reinforced by industrial interdependence that neither side can easily replace. India's manufacturing scale and Israel's innovation depth are structurally complementary in exactly the sectors (heavy electrical equipment, industrial automation, and robotics) that will determine competitiveness in the next phase of global manufacturing. The institutional foundations for this convergence already exist and are being actively reinforced, even as regional volatility complicates trade in the near term. Building on that foundation deliberately, through joint funds, co-located manufacturing clusters, and shared intellectual property, would allow both countries to become indispensable to a form of manufacturing the current global order has decided it can no longer take for granted. *

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