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The 'Donroe Doctrine', A Broken International Order

Context

- The turn of 2026 underscores the erosion of the post-Second World War international order.
- Structures once rooted in multilateral norms and collective security are giving way to a fragmented environment driven by unilateral coercion, regional power assertions, and opportunistic diplomacy.
- The year reveals a world transitioning from **rules-based order** to **competitive multipolarity**, where norms often yield to force and influence.

The New 'Donroe Doctrine' and the Return of Hemispheric Hegemony

- The year begins with a dramatic U.S. operation: the abduction of Venezuelan President Nicolás Maduro, justified as a security imperative and framed as an updated incarnation of the nineteenth-century Monroe Doctrine.
- This new '**Donroe Doctrine**' reflects President Donald Trump's instinct to restore hemispheric primacy and assert the United States as the dominant guarantor of security in the Western Hemisphere.
- Trump's November 2025 **National Security Strategy (NSS)** articulates ambitions to deny non-Hemispheric competitors' strategic access to the region.
- The Venezuelan action fits a broader pattern of **hemispheric reassertion**, combined with veiled signals toward Cuba, Colombia, Mexico, and even **Greenland**.
- The muted international response reinforces the perception that sovereignty norms have weakened and that the post-1945 security architecture is no longer constraining major powers.
- This environment invites emulation: China and Russia now appear more confident about advancing their own spheres of influence, with Taiwan representing China's most salient potential **flashpoint**.
- Global politics edges toward a world of **regional doctrines** rather than global consensus.

The Trouble in Asia: A Region of Uneven Fires

- **The Trouble in West Asia**
 - West Asia enters 2026 in a fractured state. Israel's military offensives in Gaza have paused, yet durable peace remains elusive.
 - Violence persists as a background condition, especially in densely populated and contested zones.
 - Instability deepens with unrest in Iran, where the regime identifies itself as fighting **four simultaneous wars**: economic, psychological, military, and counterterrorism.

- The U.S. and Israel perceive an opportunity to undermine the **Khamenei regime**, reviving unfinished objectives from 2025.
- Additional sanctions and covert manoeuvres heighten regional tension, making **escalation** more likely than reconciliation.

• **Afghanistan and Bangladesh**

- The **Tehreek-e-Taliban Pakistan (TTP)** and allied militant groups gain renewed momentum, threatening the fragile Afghanistan–Pakistan frontier.
- Pakistan experiences intensified military dominance under Field Marshal Asim Munir, with democratic processes further eroded.
- Yet Islamabad paradoxically enjoys revived status as a preferred U.S. partner and recipient of advanced **weapons systems**, reshaping regional balances.
- Bangladesh confronts democratic uncertainty as elections promise procedural renewal without guaranteeing stability.
- Together, these trends render West and Northwest Asia **a mosaic of local crises** without regional mechanisms for conflict resolution.

China's Strategic Poise and the Pacific Reshuffle

- Amid this volatility, China finishes 2025 with strengthened geopolitical posture.
- The tariff confrontation with the U.S. fails to cripple Chinese industry; instead, Beijing consolidates its position in **global supply chains** and uses rare earth export restrictions as strategic leverage.
- These actions underscore China's capacity for **economic statecraft**.
- China's influence expands across Southeast Asia and the **Indian Ocean**, eroding traditional U.S. dominance in the **Eastern Pacific**.
- Power shifts occur quietly through investments, infrastructure, and maritime logistics rather than direct confrontation.
- The U.S. finds itself stretched between reasserting hemispheric control and countering Chinese expansion across the Indo-Pacific.

India at the Crossroads: Strategic Uncertainty and Diplomatic Constraints

- India enters 2026 in an ambiguous strategic position. Despite alignment with U.S. interests on several fronts, Trump criticizes India's continued imports of **Russian oil** and cultivates closer ties with Pakistan, producing a subtle diplomatic chill.
- This reduces India's leverage in West Asian crises and narrows its mediation space.
- Mini-lateral initiatives such as **I2U2** and the India–Middle East–Europe **Economic Corridor** progress, yet economic vulnerabilities remain.
- China holds a tactical advantage in tariff and trade disputes, limiting India's ability to hedge.
- The improvement in India-China relations after the 2025 Tianjin meeting stabilizes tensions but does not generate momentum for deeper rapprochement.
- Terrorism persists as an ambient threat in 2026. While India may avoid major attacks, **Islamic State** and **al-Qaeda** activity in Africa and West Asia ensures that militant networks remain dispersed, resilient, and

transnational.

Conclusion

- The emerging world of 2026 is defined not by institution-building but by **geopolitical disorder**.
- The **Donroe Doctrine** symbolises a shift from multilateral restraint to unilateral assertion, encouraging similar ambitions among rival powers.
- Middle states such as India must adapt to an environment where power increasingly substitutes for legitimacy and where **regionalism** replaces global security consensus.

The 'Donroe Doctrine', A Broken International Order FAQs

Q1. What is the 'Donroe Doctrine'?

Ans. The 'Donroe Doctrine' is the updated U.S. strategy under President Trump asserting U.S. dominance in the Western Hemisphere and restricting external influence.

Q2. Why is West Asia described as unstable in 2026?

Ans. West Asia is unstable due to unresolved conflicts in Gaza, widespread unrest in Iran, and heightened regional tensions driven by U.S. and Israeli pressure.

Q3. How did China strengthen its geopolitical position in 2025?

Ans. China strengthened its position by resisting U.S. tariffs, reinforcing global supply chains, and expanding its influence in Southeast Asia and the Indian Ocean.

Q4. What challenges does India face in 2026?

Ans. India faces strategic uncertainty due to U.S. criticism, closer U.S.-Pakistan ties, and limited leverage in tariff and trade disputes with China.

Q5. Why is terrorism considered an ongoing threat in 2026?

Ans. Terrorism remains a threat because networks like Islamic State and al-Qaeda continue operating across Africa, West Asia, and South Asia despite shifting fronts.

Source: **The Hindu**

The EV Boom is Accelerating a Copper Crunch

Context

- The rapid global shift to electric vehicles is driving an unprecedented surge in copper demand, as the metal is essential for EV batteries, motors, wiring, charging networks, and power grids.
- While EV sales have grown exponentially over the past decade, copper supply has lagged due to underinvestment, declining ore quality, and long mine development timelines.
- This mismatch could trigger a **structural copper deficit** as early as 2026, reshaping global trade, intensifying geopolitical competition, and potentially slowing or raising the cost of the EV transition.

- This article highlights how the rapid global shift to electric vehicles is triggering an underappreciated copper crunch, as soaring EV demand collides with slow-moving supply, creating a structural risk to electrification, trade, and climate goals.

EV Sales and Copper Demand in Lockstep

- The electric vehicle transition shows a strong, near one-to-one relationship between EV sales growth and copper demand.
- From 2016 to 2024, copper demand rose faster than EV adoption, with elasticity mostly above 1.0, despite efficiency improvements.
- **Rising Copper Intensity of Electrification**
 - EV-related copper use jumped from about 39,000 tonnes in 2016 to over 1.1 million tonnes in 2024, alongside EV sales growth from 0.75 million to nearly 17 million units.
 - The peak elasticity in 2019 reflected larger batteries, more power electronics, and rapid charging infrastructure.
- **Structural Pressure on Copper Supply**
 - Even as elasticity moderates with efficiency gains, absolute copper demand will keep rising due to scale.
 - EVs use four to five times more copper than conventional vehicles, with no viable substitutes, making copper a key constraint on global electrification.

Supply-Demand Imbalance in the Copper Market

- Global copper demand is rising rapidly, while supply growth has slowed, creating a widening structural gap often described as a “jaw-opening deficit”.
- This imbalance marks the start of a prolonged copper shortage phase.
- **Why Supply Is Falling Behind** – Supply growth is constrained by declining ore grades at existing mines, long 10–15 year timelines for new projects, and environmental opposition in key producers such as Chile, Peru and the United States.
- **From Surplus to Severe Deficit** – In 2024, global copper supply is expected to exceed demand by about 0.3 million tonnes. By 2026, demand may reach 30 million tonnes, while supply lags near 28 million tonnes.
- **A Rapidly Widening Gap** – The deficit could widen to 4.5 million tonnes by 2028 and nearly 8 million tonnes by 2030 — equivalent to the combined output of the world’s ten largest copper mines.
- **Implications for Electrification** – Such shortages could raise EV costs, delay charging infrastructure, and strain decarbonisation goals. Without rapid expansion of mining, recycling and material innovation, copper scarcity may become electrification’s main bottleneck.

China at the Centre of EV-Driven Copper Demand

- The geography of EV-led copper consumption is reshaping global market dynamics, with China emerging as the dominant force.
- China’s EV-related copper demand rose from about 78,000 tonnes in 2020 to nearly 6,78,000 tonnes in 2024 and is projected to reach around 7,80,000 tonnes by 2025, accounting for almost 60% of global EV-linked

copper use.

- **Integrated Supply Chains and Strategic Advantage**

- China's dominance is driven not just by EV sales but by its control of over 70% of global battery cell production and a deeply integrated supply chain.
- This gives Beijing strong pricing power, long-term contracting leverage, and strategic influence over copper-rich regions.

- **Uneven Global Consumption Patterns**

- By 2025, EV-related copper demand is expected to reach around 2,10,000 tonnes in the European Union and 1,14,000 tonnes in the United States, while India's demand remains modest at roughly 7,200 tonnes.
- This asymmetry reinforces China's structural advantage.

- **Copper as the Artery of the Energy Transition**

- The EV revolution is transforming not just transport but the global metals economy.
- Copper has become the critical artery of electrification, with demand nearing levels that outpace supply in unprecedented ways.

- **Resource Strategy Will Shape Electrification**

- Policymakers, investors and planners must recognise that the energy transition is inseparable from resource strategy.
- Without decisive action on copper supply, recycling and innovation, geology—not ambition—will set the pace of electrification.

The EV Boom is Accelerating a Copper Crunch FAQs

Q1. Why is copper critical to the electric vehicle transition?

Ans. Copper is essential for EV batteries, motors, wiring, charging infrastructure and power grids, making electrification far more copper-intensive than conventional automotive and energy systems.

Q2. How closely are EV sales and copper demand linked?

Ans. EV sales and copper demand move almost in lockstep, with copper demand often growing faster than EV adoption due to larger batteries, power electronics and charging networks.

Q3. Why is a global copper deficit expected after 2026?

Ans. Decades of underinvestment, declining ore grades, long mine development timelines, and environmental resistance have constrained supply as EV-driven demand accelerates sharply.

Q4. How does China dominate EV-related copper consumption?

Ans. China accounts for nearly 60% of global EV-linked copper demand, driven by high EV sales, control over battery production, and deeply integrated supply chains.

Q5. What risks does copper scarcity pose to electrification goals?

Ans. Copper shortages could raise EV costs, delay charging infrastructure, intensify geopolitical competition, and slow decarbonisation, making resource availability a key constraint on energy transition ambitions.

Source: TH

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