

# DAILY NEWSP APER ANALYSIS

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THE HINDU & INDIAN EXPRESS**

**CHANAKYA IAS ACADEMY  
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# West Asia war widens, spikes oil, strands flyers

Iran targets U.S. assets, Israel, Arab states; three jets shot down in Kuwaiti 'friendly fire', says U.S.

Tehran claims shooting down one U.S. jet; Qatar says its Air Force took down two Iranian bombers

The U.S. 'will no longer be safe', warns Iran; Trump says 'big wave' is yet to come in the war

Associated Press  
DUBAI

Iran and allied armed groups fired missiles at Israel, Arab states, and U.S. military targets around the region on Monday, while Israel and the U.S. pounded the West Asian country as the war expanded to several fronts and death toll grew on all sides.

Three American warplanes were downed in Kuwait, which the Pentagon said were hit by Kuwaiti "friendly fire", while Iran claimed it shot down a U.S. jet.

The conflict, in its third day, was already having far-reaching consequences, with previously safe havens in the Gulf like Dubai seeing incoming fire, hundreds of thousands of stranded airline passengers stranded around the globe, and oil prices shooting up by more

than 8% to hover around the \$80 a barrel mark as of mid-day on Monday.

The Iranian Red Crescent Society said that the U.S.-Israeli strikes have killed at least 555 people. In Israel, where several locations were hit by Iranian missiles, 11 people were killed. The Iran-backed Hezbollah militant group also targeted Israel, which responded with strikes on Lebanon, killing more than two dozen people. Four U.S. troops have also been killed.

**'Mistakenly shot down'**

The chaos of the conflict became apparent when the U.S. military said Kuwait had "mistakenly shot down" three American F-15E Strike Eagles while Iranian attacks were under way. Iranian Armed Forces said they have shot down an advanced U.S. F-15 fighter jet near the border with



**Warning plumes:** Smoke rises from a warehouse in Sharjah City in the UAE following Iranian strikes. AP

Kuwait. Qatar Air Force downed two Iranian bombers, its Defence Ministry said.

"We will not negotiate with the United States", Iran's top security official Ali Larjani said on Monday after several air strikes hit

Tehran, even as Iran's Revolutionary Guards warned the U.S. that it will "no longer be safe".

The intensity of the attacks, the killing of Iranian Supreme Leader Ayatollah Ali Khamenei, and the lack of any apparent exit plan

indicated the conflict would not end anytime soon even as U.S. allies pledged to help stop Iranian missiles and drones. Iran media reported that the wife of the slain Supreme Leader died on Monday after succumbing

to the wounds sustained in the attack. Mansoureh Khojasteh Bagherzadeh, 79, had been in a coma since the strikes on Saturday killed Khamenei, the Tasnim news agency said.

The "big wave" is yet to come in the war with Iran, U.S. President Donald Trump told CNN on Monday, adding that the U.S. does not know who the country's new leader will be following the killing of Khamenei.

**'Nuclear facility hit'**

Iran has long threatened, if attacked, to drag the region into total war, targeting Israel, the Gulf Arab states, and the flow of crude oil crucial for global energy markets. All of these came under attack on Monday, even as Israel and the U.S. bombed Iranian missile sites and targeted its Navy, claiming to have destroyed its head-

quarters and multiple warships. Iran also accused Israel and the U.S. on Monday of having attacked its nuclear facility at Natanz, one of the main targets of the previous conflict between them last June.

Meanwhile, Saudi Arabia's Ras Tanura oil refinery came under attack from drones, with defenses downing the incoming aircraft, a military spokesman told the state-run Saudi Press Agency. The refinery has a capacity of over half a million barrels of crude oil a day. A drone also targeted an oil tanker in the Gulf of Oman, killing one mariner, the sultanate said, while debris fell on an oil refinery in Kuwait.

(With inputs from AFP)

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## KEY HIGHLIGHTS

### Context of the News

- Escalation of direct military conflict between Iran and Israel, with active involvement of the United States.
- Missile strikes and air raids targeting military bases, energy infrastructure, and alleged nuclear facilities including Natanz Nuclear Facility.
- Iran-backed Hezbollah launched attacks on Israel; Israel retaliated in Lebanon.
- Attacks reported near major oil installations such as Ras Tanura Refinery.
- Global crude prices rose sharply amid fears of Strait of Hormuz disruption.

### Key Points

- Strait of Hormuz
  - Connects Persian Gulf to Gulf of Oman → Arabian Sea.
  - One of the world's most critical oil chokepoints (~20% of global petroleum trade).
- Natanz Nuclear Facility
  - Major uranium enrichment site in Iran.
  - Monitored by International Atomic Energy Agency (IAEA).
- Nuclear Non-Proliferation Treaty (NPT)
  - Iran is a signatory as a non-nuclear weapon state.
  - Obligates safeguards and IAEA inspections.
- Ras Tanura Refinery (Saudi Arabia)
  - Among the largest oil refineries globally.
  - Strategic for global crude supply stability.
- Oil Price Transmission to India
  - India imports ~85% of crude oil.
  - Direct impact on inflation, Current Account Deficit (CAD), and fiscal deficit.

### Static Linkages

- Global maritime chokepoints: Strait of Hormuz, Bab-el-Mandeb, Suez Canal.

- Article 51 of UN Charter – Right to self-defence.
- Strategic Petroleum Reserves (SPR) in India – Visakhapatnam, Mangaluru, Padur.
- Energy security as defined in Economic Survey.
- Principles of International Humanitarian Law:
  - Proportionality
  - Distinction
- OPEC and oil price stabilization mechanisms.

### Critical Analysis

#### Geopolitical

- Risk of regional spillover war.
- Leadership vacuum in Iran may alter regional power balance.
- Greater involvement of global powers may intensify proxy conflicts.

#### Economic

- Oil price spike → imported inflation in India.
- Impact on rupee depreciation and CAD.
- Aviation, shipping, and insurance costs likely to rise.

#### Nuclear Security

- Attack on nuclear facility may undermine global non-proliferation regime.
- Risk of weakening IAEA oversight.

#### For India

- 8+ million Indian diaspora in Gulf region.
- Remittances and trade exposure.
- Need for strategic balancing: Israel-Iran-Gulf-U.S. relations.

### Way Forward

- Diplomatic de-escalation through UN and regional mediators.
- Strengthening India's Strategic Petroleum Reserves.
- Diversification of energy imports (Russia, U.S., renewables).
- Acceleration of National Green Hydrogen Mission.
- Preparedness for evacuation operations if required.
- Revival of diplomatic engagement on Iran nuclear framework.

# India and Canada agree to \$1.9 billion uranium deal as Carney meets PM Modi

Suhasini Haider  
NEW DELHI

India and Canada on Monday agreed to a \$1.9 billion, 10-year uranium supply deal for Indian nuclear power reactors, and to conclude the Comprehensive Economic Partnership Agreement (CEPA) this year, as Prime Minister Narendra Modi held talks with Canadian Prime Minister Mark Carney in New Delhi in an effort to establish "strategic trust" and reset ties ruptured over the past few years.

However, issues over the killing of Canadian-Khalistani activist Hardeep Singh Nijjar persisted after new reports that Canadian investigative agencies believe two officials in the Indian Consulate in Vancouver were linked to the case, a charge that India rejected.

After the talks between the Prime Ministers, India and Canada announced a number of agreements including a Strategic Energy Partnership in the fields of renewable energy, LPG and uranium supplies, and cooperation in critical and emerging technologies, as well as MoUs on education and culture.

**India-led alliance**  
They also issued the "Terms of Reference" for the CEPA or free trade negotiations, aiming to double bilateral trade by 2030. Canada also decided to join the India-led multilateral International Solar Alliance (ISA) and Global Biofuel Alliance as a member. The two leaders discussed the escalation of the conflict in West Asia, although they didn't put



Fruitful talks: Prime Minister Narendra Modi with his Canadian counterpart Mark Carney in New Delhi on Monday. ANI

out any joint understanding on the issue. Mr. Modi described the situation as one of "deep concern" and called for "diplomacy and dialogue" to resolve it.

On Friday, Mr. Carney, who spent the weekend in Mumbai, issued a statement supporting the U.S.'s strikes on Iran.

Mr. Carney is the first Canadian Prime Minister to make a bilateral visit to India since his predecessor

Justin Trudeau visited India in 2018, and then in 2023 to attend the G20 summit. Both visits were fraught with tensions, especially over New Delhi's concerns that the Canadian government is harbouring violent anti-India groups, including Khalistani leaders, and Ottawa's accusations that Indian government officials are involved in "transnational repression" of these groups.

In a joint statement issued on Monday, India and Canada agreed to strengthen security cooperation in a number of areas, including addressing "violent extremism, terrorism, organised crime", and called for an early meeting of the Joint Working Group

on Counterterrorism, to follow recent talks between the National Security Advisers.

**Nijjar killing row**

"Prime Minister Carney also underscored that Canada will continue to take measures to combat transnational repression," a statement issued by Mr. Carney's office said separately.

On Monday, *The Globe and Mail*, a Canadian newspaper, quoted official sources saying that the Canadian Security Intelligence Services (CSIS) had "evidence" pointing to the involvement of two Indian officials at the Indian consulate in Vancouver in the Nijjar killing case, set to go to trial this year.

In addition, Canadian newspaper *The National Post* reported a statement by the CSIS that it stands by a previous assessment that India is a "perpetrator of foreign interference and espionage against Canada".

When asked about the reports, Ministry of External Affairs Secretary P. Kumar said India continues to reject all such charges.

- Significant source of pulses for India.
- Hosts large Indian diaspora.
- ISA launched at COP21 (Paris, 2015).
- Global Biofuel Alliance launched during India's G20 Presidency (2023).

## Key Points for Mains

### Energy Security Dimension

- Nuclear energy provides baseload, low-carbon power.
- Supports India's:
  - Net Zero target (2070).
  - Non-fossil fuel capacity expansion.
- Reduces overdependence on fossil fuel imports.

### Economic Dimension

- CEPA can:
  - Increase bilateral trade.
  - Diversify supply chains (critical minerals, energy inputs).
  - Boost services trade (education, IT, fintech).

### Strategic & Geopolitical Dimension

- Engagement with a G7 country enhances India's strategic autonomy.
- Counterterrorism cooperation reflects shared security concerns.
- Diaspora politics remains a friction point in bilateral ties.

## Static Linkages

- Three-Stage Nuclear Programme (PHWR → FBR → Thorium cycle).
- NSG waiver (2008) and India's exceptional status in global nuclear commerce.
- Article 51: Promotion of international peace.
- Energy security as part of economic sovereignty.
- Diaspora diplomacy in India's foreign policy.

## Critical Analysis

### Positives

- Enhances energy diversification.
- Deepens climate cooperation.
- Expands trade and investment prospects.
- Strengthens multilateral climate platforms (ISA, Biofuel Alliance).

### Concerns

- Political trust deficit due to ongoing investigation.
- Trade negotiations may face regulatory and political hurdles.
- Nuclear energy expansion requires strong safety and liability frameworks.

## Way Forward

- Fast-track CEPA negotiations with balanced tariff concessions.
- Institutionalise high-level security dialogue mechanisms.
- Enhance cooperation in critical minerals and clean technologies.
- Maintain diplomatic engagement while separating legal investigations from strategic cooperation.
- Promote people-to-people ties to reduce political mistrust.

## KEY HIGHLIGHTS

### Context of the News

- India and Canada signed a \$1.9 billion, 10-year uranium supply agreement for Indian nuclear power reactors.
- Both sides agreed to conclude negotiations for a Comprehensive Economic Partnership Agreement (CEPA) within the year.
- Announcement of a Strategic Energy Partnership (renewables, LPG, uranium, critical technologies).
- Canada decided to join the International Solar Alliance (ISA) and the Global Biofuel Alliance.
- Diplomatic reset effort after tensions over the killing of Hardeep Singh Nijjar, which India has denied involvement in.
- Agreement to strengthen counterterrorism cooperation and convene Joint Working Group on Counterterrorism.

## Key Points for Prelims

- Canada is among the world's top uranium producers (notably Saskatchewan region).
- India imports uranium due to limited domestic reserves.
- Civil nuclear cooperation enabled after:
  - 2008 NSG waiver.
  - 2010 India-Canada Civil Nuclear Cooperation Agreement.
- CEPA: A comprehensive trade agreement covering goods, services, investment, IPR, and dispute settlement.
- Canada:
  - Major supplier of potash (fertilizer input).

# Russian oil imports at new low; West Asia share up

T.C.A. Sharad Raghavan  
NEW DELHI

India continued its strategy of reducing Russian oil imports and sourcing more from West Asian countries and the U.S. In January 2026 as well, the latest official data shows, with Russia's share in India's oil imports falling to less than 20% for the first time since May 2022.

An analysis of the latest preliminary data from the Ministry of Commerce and Industry shows that India imported \$1.98 billion worth of crude oil from Russia in January 2026, the month before India and the U.S. issued a joint statement about an interim trade agreement between the two countries. This was also the lowest in 44 months. With this, Russia's share in Indian oil imports fell to 19.3% in January

## Fuel change

The chart shows India's crude oil imports from Russia in \$ million between February 2024 and January 2026



Source: Ministry of Commerce and Industry

2026, the lowest since December 2022.

For context, Russia's share was 27.5% two months earlier, and 33% in May 2025.

### Oil link to U.S. tariffs

While India has maintained that it decides on its energy sourcing based on independent strategic and energy security considerations, the U.S. has repeatedly linked the lowering of

tariffs on Indian imports and the potential trade deal with India's cutting down of oil imports from Russia.

Even as it lowered oil supplies from Russia, India has either retained supply levels from the West Asian countries or increased them.

About 16.6% of India's oil imports in January 2026 came from Iraq, about the same level as a year earlier.

The UAE accounted for 10.4% of India's oil imports in January 2026. Saudi Arabia saw its share of Indian oil imports jump to 17.5% in January 2026, the highest it has been since April 2023. Kuwait's share grew to 6.1%, the highest since February 2023.

However, with Iran having closed the crucial Strait of Hormuz following the conflict in West Asia, supplies of oil from all of these countries are at risk.

Multiple events over the last week could render the move to reduce Russian supplies costly for India. The trade deal with the U.S. – allegedly the main reason for India reducing cheap Russian oil imports – is in limbo following the U.S. Supreme Court's February 20 decision striking down that country's reciprocal tariffs. Further, oil supplies from the West

Asia and the U.S. are currently at risk following the conflict with Iran that started on February 28.

### Costly decision

The decision to shift away from discounted Russian oil could prove costly for India as the current conflict in West Asia has already pushed up global oil prices by more than 8% to hover around the \$80 a barrel mark as of mid-day March 2. "Every \$1 increase in crude raises India's annual import bill by approximately \$2 billion," JM Financial Services said in a note.

Further, increasing supplies from distant countries like the U.S. – which saw its share in India's oil imports rise to 6.8% in January 2026 from 5% a year earlier – means Indian refineries would have to pay higher freight charges.

- Impact of oil prices on:
  - Balance of Payments (BoP)
  - Exchange rate depreciation
  - Cost-push inflation
- Energy security dimensions:
  - Availability
  - Affordability
  - Accessibility
  - Sustainability
- Strategic Petroleum Reserves (SPRs) as buffer against supply shocks.
- Diversification of energy sources as part of long-term energy policy.

## KEY HIGHLIGHTS

### Context of the News

- In January 2026, Russia's share in India's crude oil imports fell to 19.3%, the lowest since December 2022.
- India imported crude worth \$1.98 billion from Russia – lowest in 44 months.
- Two months earlier, Russia's share stood at 27.5%; in May 2025 it was 33%.
- India increased imports from West Asian countries and the U.S.
- Closure of the Strait of Hormuz due to West Asian conflict has created supply risks.
- Global oil prices crossed \$80 per barrel, rising over 8% in one week.
- Industry estimate: Every \$1 rise in crude price increases India's annual import bill by ~\$2 billion.

### Key Points

- India imports ~85% of its crude oil requirements (Economic Survey data trend).
- Major crude suppliers: Russia, Iraq, Saudi Arabia, UAE, Kuwait, U.S.
- Strait of Hormuz:
  - Connects Persian Gulf to Gulf of Oman and Arabian Sea.
  - ~One-fifth of global petroleum consumption passes through it.
- Higher crude prices impact:
  - Current Account Deficit (CAD)
  - Inflation (via fuel & logistics costs)
  - Fiscal burden (subsidies, excise adjustments)
- Freight costs higher for distant suppliers like the U.S.

### Static Linkages

- Crude oil classified under OPEC+ dynamics and global commodity markets.

## Critical Analysis

### Positives

- Reduces overdependence on a single supplier.
- Improves bargaining power through diversification.
- May strengthen India-U.S. trade negotiations.
- Reduces geopolitical vulnerability linked to sanctions regimes.

### Concerns

- Loss of discounted Russian crude may increase import bill.
- West Asia remains geopolitically volatile.
- Closure of Strait of Hormuz exposes supply risk.
- Higher freight costs from distant suppliers.
- Possible widening of CAD and inflationary pressures.

### Way Forward

- Strengthen Strategic Petroleum Reserves (SPR) capacity.
- Enhance long-term diversified contracts (Latin America, Africa).
- Accelerate renewable energy transition (solar, green hydrogen).
- Promote energy efficiency & EV adoption to reduce oil intensity.
- Maintain strategic autonomy in foreign policy decisions.
- Develop rupee-based or diversified currency settlement mechanisms.

# Attack on tankers amid escalating Israel-Iran war raises alarm over Indian seafarers' safety

The Hindu Bureau  
CHENNAI

The attack on *Skylight*, a tanker with 15 Indian and five Iranian seafarers on board, has brought to the fore the risks to Indian seafarers serving on ships on the Persian Gulf route as well as those flagged as shadow fleet by the U.S.

Three ships have been reported to have been attacked so far since the latest round of hostilities began. One Indian national was reportedly killed in one such attack on a tanker by an unmanned explosives-laden boat off the coast of Muscat Governorate on Monday. Ship traffic through the Strait of Hormuz has ground to a halt on March 1, while the previous day, some 60 to 70 ships had transited.

Oman's Maritime Security Center said *Skylight* was attacked around five nautical miles north of the port of Khasab in the Musandam governorate, according to Oman news agency. The entire crew of 20 individuals, comprising 15



**Cannon fodder:** Oil tanker *Skylight* engulfed in flames after being struck off the Musandam Peninsula of Oman, on Monday. AFP

Indian nationals and five Iranians, have been safely evacuated. The Ministry did not identify the nationality of the deceased, but local media reported that the victim was an Indian crew member.

Oman's Ministry of Defence said in a statement, "The Maritime Security Centre reported that the oil tanker MKD VYOM was attacked by an unmanned boat 52 nautical miles off the coast of Muscat Governorate." It said that the attack resulted in a fire and explosion in the engine room and the death of one crew member. The remain-

#### Troubled waters

*Skylight* was included on the U.S. government sanctions list in December of 2025. Sanctions typically lead to companies being unable to do financial transactions or even do business, leading to wages of seafarers not being paid. It leads to much distress among seafarers, even

abandonment of ships. Repatriation of seafarers to their home nations becomes a problem too.

International Federation of Transport Workers (ITF) data shows that 6,223 seafarers were abandoned across 410 ships in 2025. In terms of nationality, India had the most abandoned seafarers with 1,125, followed by the Philippines (539), Syria (309), Indonesia (274) and Ukraine (248).

An analysis of Lloyd's List Intelligence data alongside the ITF shows that the majority of abandonments on tankers and LPG carriers in 2025 occurred on shadow fleet vessels, says Joshua Minchin, senior reporter with Lloyd's List Intelligence.

An ITF spokesperson said, "Indian seafarers represent a significant proportion of the world's seafarers working in the merchant fleet, and all efforts must always be undertaken to ensure that they are never placed in harm's way – the ITF and its affiliate unions are working around the clock

to verify the safety and security of all the seafarers we collectively represent."

Meanwhile, the Directorate General of Shipping of India has issued strict advisories restricting Indian seafarers from joining or being put on work in ships in Iran. Manning companies are prohibited from recruiting and sending Indian seafarers to Iran, while extreme caution is advised for joining any vessel scheduled to transit through Strait of Hormuz. Anil Devli, CEO of the Indian National Shipowners' Association, said that there are 27 Indian flag ships in the region with a majority of them in the Persian Gulf and some in Gulf of Aden. Many of the Indian tankers caught in the region are laden with crude oil or LPG and the rest are waiting to load the energy imports of India, which are crucial for the country. Mr. Devli requested the government to use its good offices to Iran and Israel to ensure safe movement of Indian flag ships. (With inputs from PTI)

## KEY HIGHLIGHTS

### Context of the News

- Oil tanker *Skylight* (15 Indian & 5 Iranian crew) attacked near Khasab, Oman.
- Another tanker (MKD VYOM) attacked off Muscat coast; one Indian crew member reportedly killed.
- Temporary halt of ship traffic through the Strait of Hormuz amid escalating regional tensions.
- *Skylight* was on U.S. sanctions list (Dec 2025) as part of alleged shadow fleet.
- Directorate General of Shipping (India) issued advisory restricting Indian seafarers from joining vessels in Iran and cautioning transit through Hormuz.
- 27 Indian-flagged ships currently in Persian Gulf region.

### Key Points

- Strait of Hormuz:
  - Connects Persian Gulf to Gulf of Oman & Arabian Sea.
  - ~20% of global oil trade passes through it.
  - Strategically located between Iran (north) and Oman (south).
- India's Energy Profile:
  - ~85% crude oil import dependence (Economic Survey).
  - Major imports routed via Persian Gulf.
- ITF (2025 Data):
  - 6,223 seafarers abandoned globally.
  - India had highest number (1,125).
- Merchant Shipping Act, 1958 → Governs maritime administration.
- DG Shipping → Regulatory authority under Ministry of Ports, Shipping & Waterways.

### Static Linkages

- UNCLOS provisions on:
  - Transit passage through international straits.
  - Freedom of navigation.
- India's SAGAR doctrine (Security and Growth for All in the Region).
- Strategic Petroleum Reserves (SPR) policy.
- Current Account Deficit linked to oil import bill.
- Indian Navy anti-piracy deployments (Gulf of Aden since 2008).

### Critical Analysis

#### Strategic Concerns

- Disruption → Oil price volatility → Inflation.
- Impact on Current Account Deficit.
- Increased shipping insurance costs.
- Exposure of Indian workforce to conflict zones.

#### Governance Challenges

- Shadow fleet risks.
- Sanctions compliance vs energy security dilemma.
- Limited protection mechanisms for seafarers.

#### Ethical Dimension

- State's duty to safeguard citizens abroad.
- Corporate responsibility toward crew safety.

### Way Forward

- Diversify crude import sources.
- Expand Strategic Petroleum Reserves.
- Strengthen naval presence in high-risk zones.
- Institutional welfare mechanisms for seafarers.
- Diplomatic engagement with regional actors.
- Strengthen maritime domain awareness systems.

# SC to look into feasibility of NAT for blood transfusion

Petitioner says safe blood transfusion is a fundamental part of right to life under Article 21 of the Constitution; Bench asks petitioner to file affidavit on whether State hospitals use NAT

The Hindu Bureau  
NEW DELHI

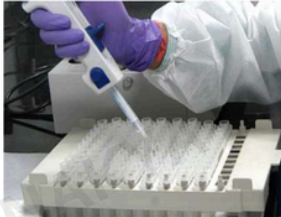
The Supreme Court has decided to look into whether blood banks should compulsorily conduct Nucleic Acid Test (NAT) for identification of diseases.

NAT is a highly sensitive molecular technique that detects the genetic material for viruses such as HIV, Hepatitis B and Hepatitis C in the blood.

A Bench of Chief Justice of India Surya Kant and Justices Joydip Bagchi and Vipul M. Pancholi asked advocate A. Velan, counsel for petitioner NGO Sarvesham Mangalam Foundation, about the cost-effectiveness of NAT compared with the more commonly used Enzyme-Linked Immunosorbent Assay (ELISA) test.

The Chief Justice questioned if all the States could afford NAT in government blood banks and hospitals. Mr. Velan said the costs were comparatively low for NAT.

"Delhi can afford it. In States who are struggling hard to pay the salaries of their employees or unable



NAT is a highly sensitive molecular technique that detects genetic material for viruses such as HIV, in the blood. REPRESENTATIVE IMAGE

to pay their electricity charges... would this be another financial burden on them?" the Bench asked.

The court asked the petitioner to research more on whether State hospitals use NAT, if so, in how many hospitals and in what States. The Bench asked the petitioner to file an affidavit with these details and posted the case for further hearing on March 13.

The petitioner argued that the right to safe blood transfusion was a fundamental part of the right to life under Article 21 of the

Constitution. In addition, the plea drew the court's attention to NAT as a mechanism to ensure the supply of safe and infection-free blood to recipients.

'Preventable tragedies' The petitioner highlighted the case of Thalassaemia patients who require frequent blood transfusion and were vulnerable to transfusion of infected blood. The petition described such medical mishaps as "preventable tragedies".

"Thalassaemia is an inherited blood disorder which is caused by the body's inability to produce enough haemoglobin, the protein in red blood cells that transports oxygen from the lungs to the tissues and carbon dioxide to the lungs. As India is the Thalassaemia capital of the world, there is a need to strengthen blood safety practices across the country...particularly the need for a standardised test to screen blood donations," the petition noted.

The case takes significance in the background of the reported case of at least six children found to be HIV positive in Madhya Pradesh's Satna allegedly due to contaminated blood transfusions at the district hospital during treatment for Thalassaemia in December 2025.

In October last year, the family of a seven-year-old Thalassaemia patient had alleged that the local blood bank in Chaibasa, in West Singhbhum, Jharkhand, had transfused HIV-infected blood. During an inquiry, by a medical team, a few days later, four more children were found to be HIV-positive from botched blood transfusion.

- Requires regular blood transfusions.
- India has high burden (as per Ministry of Health estimates).

## Legal & Policy Framework

- Blood banks regulated under:
  - Drugs and Cosmetics Act, 1940
  - Drugs and Cosmetics Rules, 1945
- National Blood Policy, 2002:
  - Ensure safe and adequate blood supply.
  - Promote voluntary donation.
  - Standardise testing procedures.

## Constitutional Dimensions

- Article 21 – Right to Life includes:
  - Right to health (Judicial interpretation).
  - Safe medical treatment.
- DPSPs:
  - State duty to improve public health.
- Issue of:
  - Fiscal federalism (capacity of poorer States).
  - Judicial intervention in policy matters.

## Critical Issues

1. Public Health vs Financial Constraints
  - NAT increases safety but raises cost.
  - States with weak fiscal capacity may struggle.
2. Equity Concerns
  - Unequal adoption may lead to:
    - Urban-rural disparity.
    - Interstate health inequality.
3. Ethical Dimension
  - "Preventable tragedies" if safer technology exists.
  - Duty of State to protect vulnerable groups (e.g., Thalassaemia patients).
4. Governance Gap
  - Lack of uniform implementation.
  - Need for centralised standards.

## Way Forward

- Gradual nationwide implementation with Central assistance.
- Inclusion of NAT under national health funding schemes.
- Strengthening regulatory oversight of blood banks.
- Creation of a national digital registry of blood screening standards.
- Public-private partnership for cost optimisation.
- Greater focus on voluntary blood donation and awareness.

## KEY HIGHLIGHTS

### Context

- The Supreme Court is examining whether Nucleic Acid Testing (NAT) should be made mandatory in all blood banks.
- Petitioner argues that safe blood transfusion is part of Article 21 (Right to Life).
- Triggered by reported cases of HIV infection among Thalassaemia patients in Madhya Pradesh and Jharkhand allegedly due to contaminated blood transfusion.
- Court has sought data on:
  - State-wise implementation of NAT,
  - Cost implications,
  - Feasibility in government hospitals.

### Key Facts

#### Nucleic Acid Testing (NAT)

- Molecular test detecting viral RNA/DNA.
- Screens for:
  - HIV
  - Hepatitis B
  - Hepatitis C
- Detects infection during window period (before antibody formation).
- More sensitive than ELISA.

#### ELISA (Enzyme-Linked Immunosorbent Assay)

- Detects antibodies/antigens.
- Longer window period than NAT.
- Less expensive and widely used.

#### Window Period (Important Concept)

- Time between infection and detectability.
- Shorter window period → safer blood supply.

#### Thalassaemia

- Genetic disorder affecting haemoglobin production.

# Israel, the U.S. and a war to build a unipolar West Asia

**I**n February 27, Oman's Foreign Minister Badr bin Hamad Al Busaidi, who was mediating talks between the United States and Iran, told an American channel that a deal was within reach. He said Iran had committed not to make a nuclear bomb "ever" and not to stockpile nuclear material. The next day, the U.S. and Israel began bombing Iran, killing its Supreme Leader, Ayatollah Ali Khamenei, and dozens of senior Iranian officials. Israel described the campaign as a "pre-emptive" war to remove "existential threats", while U.S. President Donald Trump urged Iranians to "take over your government," adding, "This will probably be your only chance for generations." It was clear from the way the initial decapitation strike was carried out and the remarks issued by Mr. Trump and Mr. Netanyahu, that what the invading bloc wanted was regime change.



Stanley Johny

The Iranian government, despite the initial blow, has reorganised itself and is hitting back. West Asia, as a result of the actions of Mr. Trump and Mr. Netanyahu, is witnessing one of the most perilous moments in the post Second World War era – a conflict whose outcome will define the region for the decades to come. After the 12-day war in June 2025, Mr. Trump announced that he had "obliterated" Iran's nuclear programme. Mr. Netanyahu declared a "historic victory". So, why did they start another war eight months later? Israel has always wanted regime change in Iran. For Tel Aviv, Iran is the only revisionist country that challenges its supremacy in West Asia. Arab countries, many of them hosting American bases or dependent on American aid, have either established ties with Israel or accepted to live with Israel's militarism and its occupation of Palestinian, Syrian and Lebanese territories. Israel sees Iran, a country of 90 million people with enormous economic potential and an advanced missile programme, as an existential threat.

When then U.S. President Barack Obama signed the nuclear deal with Iran in 2015, his focus was on addressing Iran's nuclear programme. He believed that a no-nuclear Iran would be good news for West Asia, whereas a "cold peace" between Tehran and its adversaries would be established. But, Israel had a different understanding. Its problem was not merely Iran's nuclear programme but its conventional might. That is why Mr. Netanyahu opposed the 2015 deal with all his might.

Geopolitics of Iran  
In recent times, when the U.S. and Iran were engaged in talks, Israel had repeatedly called for a deal to include Iran's missile programme and its support for non-state militias in the region. What Mr. Netanyahu wanted was a total disarmament

of Iran – a demand no Iranian leader, except someone installed by Mr. Netanyahu in Tehran – can accept. A Tehran-based security analyst told *The Hindu* on February 24 in unmistakable terms that Iran would not sign a deal with the U.S. on its nuclear programme. He said, "If Iran agrees to surrender its ballistic missiles today to avert war with the U.S., Israel will bomb us anyway a few months down the line. So, the question Iranians ask themselves is why should they give up their last deterrent?"

The only way Israel could meet all its objectives was to bring about a regime change. Regime change would also be geopolitically rewarding. Saddam Hussein's Iraq is gone. Qadhafi's Libya is gone. Bashar al Assad is in Moscow while a former jihadist is running Damascus. Hezbollah has been weakened. Hamas has been pushed to the ruins of Gaza. The Arab countries are unlikely to do anything other than issue condemnation letters. Iran is the last revisionist power standing. If the Islamic Republic is taken down, the regional balance of power would shift, setting the stage for a unipolar West Asia, with Israel, fully backed by Washington, at its centre. This is more about geopolitics and Israel's own interests than about giving freedom to the Iranians.

Decapitation strategy  
But there is one problem. Iran, ring fenced by tall mountains and roughly 70 times bigger than Israel, is a geographical fortress. Israel alone cannot bring about regime change. Typically, regime changes are achieved through a ground invasion – even then it is not guaranteed. Israel pulverised Gaza, a strip of land sandwiched between Israel and the Mediterranean Sea for 24 months and killed at least 70,000 of its people, but has still not unseated Hamas. No country, including the U.S., wants to send ground troops to Iran. If an Iraq style ground invasion is not possible, the other options are Libya or Syria. But in Libya and Syria, there was armed opposition to the regime that led the battle on the ground.

In Libya, it took months-long bombing by the North Atlantic Treaty Organisation to topple Qadhafi's regime. In Syria, which fell into a disastrous civil war in 2012, it took 12 years for Mr. Assad to fall. In Iran, there is no organised armed opposition. So, what Israel tried to do in June 2025 and February 2026 was to carry out decapitation strikes – give a blow so heavy that the regime would not stand up and fight back.

In June 2025, the Iranians recovered from the initial shock fast and began hitting back. Mr. Netanyahu had said that regime change would be a desirable outcome of the war, but he had to ask for American help and then agree to a ceasefire after 12 days. In February 2026, backed by a more willing U.S., Israel has launched a much broader

and more ambitious strike, killing Khamenei. Mr. Trump and Mr. Netanyahu want a quick, decisive victory. But if they thought the assassination of the "leader of the revolution" would lead to the crowds jamming the streets and taking over the institutions bringing down the regime, that has not happened – not as yet. Iran seems prepared for this moment, and is hitting back at American bases across the region, and Israel, widening the war.

A regional war  
During the 2025 June war, Iran's response was mainly focused on Israel. It launched a token strike on the U.S. base in Qatar following an American attack on its nuclear facilities and subsequently agreed to a ceasefire. But this time, Iran is hitting American bases across the Persian Gulf kingdoms and Israel. Iranian missiles and drones have targeted a military base in Cyprus and a French base in the United Arab Emirates. Iran has also announced the shutting of the Strait of Hormuz, the narrow chokepoint connecting the Persian Gulf with the Arabian Sea through which a third of the global energy supply flows. This is a risky gamble.

In two days, Iran has reorganised the war. This is the all-out war almost all critics of Mr. Trump's Iran policy had warned him about. The supporters of the war in Washington had said that Iran was bluffing. But it was not. If Iran continues to attack U.S. bases (some of them were hit hard) in the Gulf monarchies, these countries would be pressed to join the war. And if they do, the cross-Gulf conflict could have disastrous implications for energy trade, severely impacting the global economy. A prolonged conflict would also mean that the missile defence shields that are currently protecting these bases, Israel and other American assets in the region, would be exhausted.

This means that the clock is ticking fast for both sides. It is unclear whether Mr. Trump was prepared for a scenario in which the Iranian state survives the assault. Washington and Tel Aviv aim to destroy Iran's ballistic missile stockpiles and its launchers to blunt its firepower. But if Iran retains its strike capability and continues to widen the war, the pressure on Mr. Trump would intensify.

To be sure, there is a vast gap between the conventional strength of the U.S.-Israel alliance and that of Iran. Yet, conventional superiority alone does not guarantee victory, which depends on clearly defined and attainable objectives. If Mr. Trump seeks a swift and decisive triumph, Iran's doctrine is built precisely to deny it. Mr. Trump wants to kill the guerrilla because, as Henry Kissinger would agree, the guerrilla wins if he does not lose.

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◦ Oil price shocks → Inflation, CAD pressure.  
Focus Areas for Prelims:

- Iran, Iraq, Saudi Arabia, UAE, Qatar.
- Gulf of Oman, Arabian Sea.
- Key U.S. bases in Gulf monarchies.

## Static Linkages

- Deterrence Theory – Missiles as strategic deterrent.
- Balance of Power – Regional hegemonic competition.
- Proxy Warfare – Role of non-state actors.
- Energy Security – Strategic Petroleum Reserves (India).
- UNCLOS – Transit passage through international straits.
- Shock-and-Awe Doctrine – Decapitation strikes.

## Critical Analysis

### Strategic Dimension

- Regime change difficult without ground invasion.
- Decapitation strategy may not ensure state collapse.
- Risk of prolonged asymmetric warfare.

### Regional Impact

- Gulf monarchies vulnerable.
- Missile defence sustainability issues.
- Escalation into full-scale regional war possible.

### Impact on India

- Oil price volatility.
- Shipping insurance costs rise.
- Indian diaspora safety concerns.
- Pressure on rupee & inflation.

## Way Forward

- Revival of nuclear diplomacy framework.
- Regional security dialogue mechanism.
- Safeguarding maritime trade routes.
- India to:
  - Diversify oil import sources.
  - Strengthen Strategic Petroleum Reserves.
  - Enhance naval presence in Arabian Sea.
  - Maintain balanced diplomacy (multi-alignment).

## KEY HIGHLIGHTS

### Context of the News

- On February 27, 2026, Badr bin Hamad Al Busaidi indicated progress in U.S.–Iran nuclear negotiations.
- Within 24 hours, the U.S. and Israel launched coordinated airstrikes on Iran.
- Iran's Supreme Leader Ayatollah Ali Khamenei and senior officials were killed.
- Donald Trump and Benjamin Netanyahu hinted at regime change as an objective.
- Iran retaliated by:
  - Striking U.S. bases in Gulf countries.
  - Targeting Israel with missiles and drones.
  - Announcing closure of the Strait of Hormuz.

### Key Points

- Strait of Hormuz:
  - Connects Persian Gulf to Gulf of Oman → Arabian Sea.
  - ~30–33% of global seaborne crude oil passes through it.
  - Critical for India's energy imports.
- Iran's Strategic Features:
  - Population ~90 million.
  - Mountainous terrain → natural defence.
  - Advanced ballistic missile programme.
  - Network of proxy groups in West Asia.
- Regime Change vs Nuclear Issue:
  - 2015 nuclear deal focused on enrichment limits.
  - Israel seeks dismantling of missile capability and militia support.
- Energy Security Impact:
  - India imports ~85% of crude oil (Economic Survey).

# UGC reform debate, faultlines in politics of social justice

Recent debates over proposed changes in regulations issued by the University Grants Commission (UGC) have triggered wider political discussions on caste privileges, social discrimination and the idea of social justice in institutions of higher academics. A section of upper caste elites has opposed the UGC's regulations even as the higher judiciary quickly put the policy reform in abeyance. Media and social networks pushed for its amendment, calling the regulations discriminatory toward the social elites.

Though initiated by the Union government, the Bharatiya Janata Party has also hesitated to defend the UGC rules. This is only logic for the right-wing party to avoid upsetting its core political supporters, mainly the social elite. Yet, such distancing risks alienating Bahujan groups as they have joined the Hindutva bandwagon hoping to expand their representation in power and gain substantive social and class mobility. In the current debate, though Bahujan groups have remained fragmented and leaderless in promoting their interests, they have the potential to harm the electoral prospects of the right wing party.

**Inclusive subaltern Hindutva**  
The rise of Narendra Modi as the dominant leader in national politics has led to the social character of the BJP changing considerably. It was suggested that the BJP shift from its visible Brahmanical focus to bringing Dalit, Bahujan and Adivasi (DBA) groups into the party structure. The BJP's electoral success as a new 'Subaltern Hindutva' party is overly dependent upon the support of the DBA groups, while the social elites have remained its committed support base. The party's new social engineering also checkmates the 'official' parties of the Dalit-Bahujan castes, such as the Bahujan Samaj Party and the Samajwadi Party in Uttar Pradesh and the Rashtriya Janata Dal in Bihar. A sizable faction within the vulnerable castes (especially the lower Other Backward Classes, or OBCs) has trusted



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the BJP more for their welfare, hoping that an inclusive Hindutva platform would offer them social dignity and equitable participation in the power structures.

The shift of certain DBA sections has made the BJP a formidable force. However, in return for their support these groups have only received some tokenistic presence in the power structures. Their class conditions remain precarious, and they often face discrimination and violence from dominant social groups. The lower OBC groups (mainly the artisanal castes, landless labourers and lower middle class sections of the urban population) have negligible presence in modern state institutions and the urban market economy. Further, limited access to quality higher education keeps their presence in IT related and other elite professions minimal.

**The OBC question**  
After the release of the Bihar Caste Survey in 2023, a similar factsheet showed that almost 40% of the State's population is considered Extremely Backward Castes (EBCs), a majority of whom are landless or dependent on the rural economy and an education status that is similar to Dalits and Adivasis. It was expected that the ruling establishments, at the State and Centre, would take cognisance of the grave situation and formulate policy for their welfare. However, there was no such initiative.

It appears that the new UGC regulations were drafted to address the growing problems faced by OBC candidates in academic institutions. The Education Ministry faces constant criticism by the Opposition for failing to meet Scheduled Caste/Scheduled Tribe (SC/ST) and OBC quotas in central universities and premier institutes such as the IIMs, IITs, and AIIMS. The parliamentary report on the recruitment of professors in central universities has shown that OBCs constitute less than 3% of central university faculty. Importantly, they also face overt discrimination in the recruitment process (by using the 'not found suitable' rubric). Unlike SC/STs, OBC members

have limited institutional support to protect them from caste-based discrimination on campuses.

In the new UGC regulations, the addition of OBCs and other vulnerable groups (like the EWS) alongside SC/STs is an acknowledgment that a vast section in university campuses survive as vulnerable social groups under the dominant presence of the social elites and, therefore, in need of legal safeguards. The new regulations appeared to be crucial corrective measures in making academic institutions more democratic, inclusive and responsible towards the agenda of social justice. However, the reforms have stalled following backlash, leaving the vulnerabilities that DBA groups face unaddressed.

**The BJP's dilemma**  
The BJP's inclusive Hindutva has captivated sections among the DBA and has presented the party as a promising representative of Hindu unity. The UGC debate has challenged this celebrated idea, revealing that caste-based divisions occupy social space. The counter against the new UGC reforms has shown that the social elites have little concern for the inclusive welfare of marginalised social groups. As social justice policies reveal and disturb the control and hegemony of the traditional ruling elites, such attempts are targeted as anti-national, harmful to meritocracy or as an assessment of identity politics.

The BJP has failed to convince social elite opponents about the political necessity of such a policy framework that would also ameliorate the deplorable conditions of DBA groups. The sponsor by a section of the social elites has become effective because of the BJP's tacit silence and hesitation to defend the policies of social justice. Such a nexus between the right-wing party and conservative social elites may have relegated the agenda of social justice to the periphery. But it also ignites a new consciousness among vulnerable social groups about their expendability within Hindutva politics, resulting in their exit from the right-wing party.

• Article 16(4)

- Reservation in public employment for backward classes not adequately represented in services.
- Faculty Representation Issue
  - Parliamentary Standing Committee reports indicate under-representation of OBCs in faculty positions in central universities.
  - "Not Found Suitable" clause cited as a procedural barrier.
- Bihar Caste Survey (2023)
  - Extremely Backward Castes (EBCs) constitute around 36–40% of the population.
  - Highlights socio-economic and educational backwardness.

## Static Linkages

- Equality before law – Article 14
- Prohibition of discrimination – Article 15
- Equality of opportunity in public employment – Article 16
- Directive Principle: Promotion of educational and economic interests of SCs, STs and other weaker sections – Article 46
- Mandal Commission (1980) recommendations on OBC reservation
- Indra Sawhney Judgment (1992) – 50% cap on reservations (with exceptions in extraordinary circumstances)

## Critical Analysis

### Arguments in Favour of Reforms

- Enhances economic substantive equality, not merely formal equality.
- Addresses structural under-representation in faculty positions.
- Promotes diversity in academic institutions.
- Aligns with Article 46 (DPSP).
- Ensures accountability in recruitment processes.

### Concerns Raised

- Allegations of dilution of "merit".
- Fear of excessive regulatory intervention in university autonomy.
- Political polarization around caste-based policies.
- Implementation challenges and judicial scrutiny.

### Broader Issues

- Persistent gap between reservation in admissions vs faculty positions.
- Social capital and network advantages influencing recruitment.
- Limited institutional grievance redressal mechanisms for OBCs compared to SC/ST protections.

## Way Forward

- Strict monitoring of reservation implementation in faculty recruitment.
- Transparent recruitment processes with independent oversight.
- Periodic social audits of higher education institutions.
- Capacity building and academic mentoring for marginalized scholars.
- Strengthening Equal Opportunity Cells in universities.
- Evidence-based policymaking using caste-disaggregated data.

## KEY HIGHLIGHTS

### Context of the News

- The University Grants Commission (UGC) proposed amendments to its regulations aimed at strengthening safeguards for socially vulnerable groups in higher education institutions.
- The proposed changes reportedly sought to expand institutional protections and ensure better compliance with reservation norms for OBCs and other disadvantaged groups.
- The reforms faced opposition from sections of social elites who termed them as discriminatory and against "merit".
- The higher judiciary put the reforms in abeyance following legal challenges.
- The debate has revived discussions on caste-based inequalities, representation in academia, and social justice policies.

### Key Points

- UGC
  - Statutory body under the UGC Act, 1956.
  - Functions under the Ministry of Education.
  - Responsible for coordination, determination and maintenance of standards of higher education.
- Reservation in Central Educational Institutions
  - 15% – Scheduled Castes (SC)
  - 7.5% – Scheduled Tribes (ST)
  - 27% – Other Backward Classes (OBC) (after 93rd Constitutional Amendment Act, 2005)
  - 10% – Economically Weaker Sections (EWS) (103rd Constitutional Amendment Act, 2019)
- Article 15(5)
  - Enables the State to make special provisions for socially and educationally backward classes in educational institutions (including private institutions, except minority institutions)

## New reality

Fiscal targets will now be realigned based on more accurate data

The release of the new series of national accounts data is a heartening improvement to India's key economic statistics, but the data highlights some aspects that merit policy attention. The new series updates the base year of India's Gross Domestic Product and Gross Value Added data to 2022-23 from the earlier 2011-12. This was a long-overdue update, since the earlier data was becoming more outdated and unrepresentative with each passing year. Apart from the updated base year, the new series has several methodological improvements and new data sources for greater robustness. For example, the adoption of the double-deflator approach, which accounts for the effect of inflation separately for intermediate goods and the final product, is a marked improvement in terms of ascertaining the real value added of India's production. Similarly, the new series allocates multi-sector company output proportionately, improving sectoral data accuracy. The data on households will now be obtained from the Annual Survey of Unincorporated Sector Enterprises (ASUSE) and Periodic Labour Force Survey (PLFS) on an annual basis instead of relying on extrapolations as was done in the 2011-12 series. Notably, the Goods and Services Tax data, a goldmine of consumer data, will be used in the new series. The new series will also include new sources and methods of estimation for sectors that have historically been difficult to quantify such as the agricultural sector and the vast informal sector. All of these should yield a more accurate picture of India's economic size and growth.

The new series predicts India's GDP to grow 7.6% in the current financial year 2025-26, which is faster than the 7.4% predicted for the year in the old series. While the rate might bring cheer, the new absolute size of the economy is somewhat sobering. The new series pegs India's economy at ₹345.47 lakh crore in 2025-26, which is about 3.3% smaller than what was predicted based on the old series. The size of the economy in both 2023-24 and 2024-25 was also revised downward by 3.8% each. Along with the depreciation of the rupee, this has meant that India is currently a \$3.8 trillion economy, with the \$5 trillion target moving further away. A smaller economic size also means the Centre's various commitments to lower the fiscal deficit and debt – ratios that are pegged to nominal GDP – also become that much tougher to achieve. That said, it is better to realign targets based on more accurate data than to blithely forge ahead with decade-old metrics.

## KEY HIGHLIGHTS

### Context

- Government released a new series of National Accounts Statistics (NAS) with base year shifted from 2011–12 to 2022–23.
- Earlier base year had become outdated due to structural changes (GST, digitalisation, formalisation, pandemic impact).
- Revised GDP estimate for 2025–26: 7.6% growth (higher than earlier 7.4%).
- However, absolute GDP size revised downward to ₹345.47 lakh crore (2025–26) (~\$3.8 trillion).

### Key Features of the New Series

- Adoption of Double-Deflator Method for estimating real GVA.
- Use of GST data for better measurement of value addition.
- Household sector data now based on:
  - Annual Survey of Unincorporated Sector Enterprises (ASUSE)
  - Periodic Labour Force Survey (PLFS)
- Improved allocation of multi-sector corporate output.
- Better estimation of:
  - Agriculture
  - Informal sector
  - Services sector

### Why Base Year Revision is Important

- Reflects structural changes in the economy.
- Incorporates latest consumption patterns.
- Improves sectoral representation.
- Enhances accuracy of inflation-adjusted (real) growth.
- Aligns India's statistics with international best practices (SNA framework).

### Economic Implications

- GDP for 2023–24 and 2024–25 revised downward (~3.8%).
- Smaller GDP affects:
  - Fiscal deficit-to-GDP ratio
  - Debt-to-GDP ratio
  - \$5 trillion economy target timeline
- Realignment of fiscal targets may be required under FRBM framework.

### Static Concepts to Revise

- GDP vs GVA distinction.
- Nominal vs Real GDP.
- GDP deflator concept.
- Formula:
- $GDP (MP) = GVA (BP) + Taxes - Subsidies$
- Fiscal Deficit definition.
- Debt sustainability indicators.
- Informal sector measurement challenges.
- Role of CSO/NSO in national accounts.

### Mains Perspective

#### Positives

- Better data credibility.
- Improved policy formulation.
- More accurate measurement of informal sector.
- Strengthens macroeconomic management.

#### Concerns

- Downward GDP revision impacts fiscal math.
- Policy targets become harder to achieve.
- Need for improved statistical transparency.

### Way Forward

- Periodic base year revision (every 5 years).
- Strengthening administrative data integration.
- Greater transparency in methodology.
- Capacity building in statistical systems.
- Align fiscal consolidation targets with revised GDP.

## The waning sheen

The price relief provided by GST rationalisation may not last long

The February GST mop-up shows an impressive year-on-year rise of 8.1%, with gross collections touching about ₹1.83 lakh crore. Much of this has rightly been attributed to rising consumption expenditure after the GST framework was rationalised into a two-tiered rate structure of 5% and 18% in September 2025. The rate cuts made consumer non-durables cheaper, and helped sustained sales in automobiles, appliances, mobiles and tourism-linked services. Yet, a critical vulnerability has been largely overlooked – the not-so-trivial import IGST numbers, which saw a spike of over 17% in February compared with last year. This must be viewed from a holistic perspective to understand how it affects consumption, prices and the growing disparity in GST collections between States. Import IGST collections in February rose to roughly ₹47,800 crore, up from about ₹40,800 crore a year ago. A five-year comparison of February collections (FY22-FY26) shows a nearly 41% rise from ₹33,800 crore in February 2022. At the same time, the rupee has steadily weakened. The rupee fell about 4% against the dollar between February 2025 and February 2026, and roughly 6.2% from April 2025 to February 2026. This matters as key imports are largely dollar-denominated.

India imports over 90% of its semiconductor requirements and relies heavily on crude oil, copper and aluminium imports – which together made up about 35% of February 2026 merchandise imports. Crude oil accounts for over a quarter of total imports, while semiconductors contribute about 5%, and copper and aluminium together another 3%-4%. Import values for copper and aluminium have risen materially over the past year, reflecting price firming and volume increases. Semiconductor imports have also grown sharply, even as global shortages persist. Meanwhile, crude import reconfiguration – from discounted Russian barrels to the U.S. and West Asia – likely increased India's average import bill. Higher global prices combined with a weaker rupee mechanically inflate the assessable value on which IGST is levied. These rising input costs feed into vital sectors such as automobiles and appliances. There are also signs of unevenness across States. Major States such as Tamil Nadu (-6%), Maharashtra (6%) and West Bengal (1%) lagged the national growth rate of 8% in February. This divergence suggests that national GST buoyancy has been disproportionately supported by import-led revenues rather than uniformly strong domestic demand. Import IGST is now roughly 27% of gross GST collections in the April 2025-February 2026 period, up from about 24% in the previous year – underscoring a growing dependence on import-tax revenues. Higher input costs could nullify GST rationalisation price relief, leading to higher costs for consumers.

## KEY HIGHLIGHTS

### Context of the News

- Gross GST collections in February 2026 stood at ~₹1.83 lakh crore, registering 8.1% YoY growth.
- Growth followed GST rate rationalisation (September 2025) into two principal slabs: 5% and 18%.
- Import IGST collections increased by over 17% YoY, reaching ~₹47,800 crore.
- Import IGST share in gross GST (Apr 2025–Feb 2026) rose to ~27% (from ~24% in previous year).
- Rupee depreciation:
  - ~4% (Feb 2025–Feb 2026)
  - ~6.2% (Apr 2025–Feb 2026)
- High import dependence in crude oil, semiconductors, copper, aluminium → higher assessable value for IGST.

### Key Points

#### GST Trends

- GST buoyancy linked to:
  - Consumption recovery
  - Formalisation
  - Rate rationalisation
- However, import-driven IGST growth indicates:
  - External sector influence on domestic tax buoyancy.
  - Currency depreciation impact on tax base.

#### Import IGST Mechanism

- Levied under Article 269A.

• Collected by Centre and apportioned between Centre and States.

• Calculated on:

- CIF value + Basic Customs Duty.
- Higher global prices + weaker rupee → higher IGST collections (even without volume growth).

#### Import Structure (Indicative)

- Crude oil: >25% of imports.
- Semiconductors: ~5%.
- Copper & aluminium: ~3–4%.
- India imports >90% of semiconductor demand.

#### Federal Dimension

- Import IGST contributes significantly to divisible pool.
- Uneven GST growth across States:
  - Tamil Nadu (-6%)
  - Maharashtra (6%)
  - West Bengal (1%)
- Suggests reliance on import-led revenue rather than broad-based domestic demand.

#### Static Linkages

- 101st Constitutional Amendment Act, 2016.
- Article 269A – GST on inter-State trade & imports.
- Article 279A – GST Council.
- Fiscal federalism – Finance Commission principles.
- Exchange rate pass-through and inflation (Economic Survey – External Sector).
- Input Tax Credit mechanism under GST.
- Current Account Deficit and trade balance (Macroeconomics).

#### Critical Analysis

##### Positives

- Strong GST collections reflect:
  - Improved compliance.
  - Economic activity recovery.
  - Administrative efficiency.
- Rate rationalisation simplified tax structure.
- Higher import IGST improves short-term fiscal position.

##### Concerns

- Rising import IGST may reflect:
  - Rupee depreciation rather than demand expansion.
  - Higher import bill → Current Account pressure.
- Input cost escalation:
  - May neutralise GST rate cuts.
  - Cost-push inflation risk.
- Federal imbalance:
  - States dependent on import-heavy sectors may gain disproportionately.
- Structural vulnerability:
  - High semiconductor and crude dependence.

#### Way Forward

- Accelerate domestic manufacturing:
  - Semiconductor mission.
  - Critical minerals strategy.
- Strengthen exchange rate stability through:
  - Export promotion.
  - Diversification of energy sources.
- Improve GST analytics to distinguish:
  - Volume-led vs price-led growth.
- Ensure equitable IGST settlement to States.
- Continue GST rationalisation toward revenue neutrality.

# Government's silence on killing of Iran leader is not neutral, it is abdication

ON MARCH 1, Iran confirmed that its Supreme Leader, Ayatollah Seyyed Ali Khamenei, had been assassinated in targeted strikes carried out the previous day by the United States and Israel. The killing of a sitting head of state in the heart of ongoing negotiations marks a grave rupture in contemporary international relations. Yet, beyond the shock of the event, what stands out equally starkly is New Delhi's silence.

The Government of India has refrained from condemning the assassination or the violation of Iranian sovereignty. Initially, ignoring the massive US-Israeli onslaught, the Prime Minister confined himself to condemning Iran's retaliatory strike on the UAE, without addressing the sequence of events that preceded it. Later, he uttered platitudes about his "deep concern" and talked of "dialogue and diplomacy" — which is precisely what was under way before the massive unprovoked attacks launched by Israel and the US. When the targeted killing of a foreign leader draws nuclear defence of sovereignty or international law from our country and impartiality is abandoned, it raises serious doubts about the direction and credibility of our foreign policy.

Silence, in this instance, is not neutral. The assassination was carried out without a formal declaration of war and during an ongoing diplomatic process. Article 2(4) of the United Nations Charter prohibits the threat or use of force against the territorial integrity or political independence of any state. A targeted killing of a serving head of state strikes at the heart of these principles. If such acts pass without principled objection from the world's largest democracy, the erosion of international norms becomes easier to normalise.

The uncase is compounded by the timing. Barely 48 hours before the assassination, the Prime Minister returned from a visit to Israel, where he reiterated unequivocal support for the government of Benjamin Netanyahu — even as the Gaza conflict continues to draw global outrage over the scale of civilian deaths. The myriad of women and children. At a time when much of the Global South, along with major powers — and India's partners in BRICS such as Russia and China — have kept their distance, India's high-profile political endorsement without moral clarity marks a visible and troubling departure. The consequences of this event extend beyond geopolitics. The ripples of this tragedy are visible across continents. And India's stance is signalling tacit endorsement of this tragedy.

The Indian National Congress has unequivocally condemned the bombings and targeted assassinations on Iranian soil, describing them as a dangerous escalation with grave regional and global consequences. We have extended condolences to the Iranian people and to Shia communities worldwide, reiterating that India's foreign policy is anchored in the peaceful settlement of disputes, as reflected in Article 51 of the Constitution of India. These principles — sovereignty equality, non-interference and the promotion of peace — have historically been integral to India's diplomatic identity. The present reticence, therefore, appears not merely tactical, but discordant with our stated principles.

For India, this episode is especially troubling. Our ties with Iran are civilisational as well as strategic. In 1994, when sections within the Organisation of Islamic Cooperation sought to advance a resolution against India at the UN Commission on Human Rights over Kashmir, Tehran played a consequential role in blocking that effort. That intervention helped prevent the internationalisation of the Kashmir issue at a delicate moment in India's economic trajectory. Iran has also enabled India's diplomatic presence in Zahedan near the Pakistan border — a strategic counter-balance to the development of Owadhar port and the China-Pakistan Economic Corridor.



SONIA GANDHI

The present government would do well to remember that in April 2001, the then prime minister, Atal Bihari Vajpayee, during an official visit to Tehran, reaffirmed warmly India's deep ties with Iran, both civilisational and contemporary. His acknowledgement of those long-standing relations seems to hold no relevance for our current government.

India's ties with Israel have, in recent years, expanded across defence, agriculture and technology. It is precisely because India maintains relations with both Tehran and Tel Aviv that it possesses diplomatic space to urge restraint. But such space depends on credibility. Credibility, in turn, rests on the perception that India speaks from principle rather than expediency.

This is not merely a moral proposition; it is a strategic necessity. Nearly 10 million Indians live and work across the Gulf. In past crises — from the Gulf War to Yemen to Iraq and Syria — India's ability to safeguard its citizens has rested on its credibility as an independent actor, not as a proxy.

That credibility did not emerge by accident. India's post-independence foreign policy was shaped by non-alignment — not as passive neutrality, but as a conscious assertion of strategic autonomy. It was a refusal to become subsumed into the rivalries of great powers. The present moment raises uncomfortable questions about whether that posture is being diluted. An unprincipled silence in the face of unilateral military action by powerful states looks like retreat from that principle. And in effect, an abandonment of our legacy.

This matters not only for history, but for India's present ambitions. For a country that seeks to represent the Global South, the

optics of acquiescence carry real costs. If sovereignty can be disregarded without consequence, as it is in the case of Iran, smaller powers are left exposed to the whims of the strong. India has repeatedly argued for a rules-based international order that protects the weak from coercion. That argument rings hollow if it is not voiced when the test is immediate and uncomfortable. Why should countries in the Global South trust India to defend their territorial integrity tomorrow if it appears hesitant to defend that principle today?

The appropriate forum for resolving this dissonance is Parliament. When it convenes, this disturbing silence over the breakdown of international order must be debated openly and without evasion. The targeted killing of a foreign head of state, the erosion of international norms, and the widening instability in West Asia are not peripheral matters; they touch directly upon India's strategic interests and moral commitments. A clear articulation of India's position is overdue. Democratic accountability demands no less, and strategic clarity requires it.

India has long invoked the ideal of *vasudhaiva kutumbakam* — the world is one family. That civilisational ethos is not a slogan for ceremonial diplomacy; it implies a commitment to justice, restraint and dialogue, even when doing so is inconvenient. At moments when the rules-based order is under visible strain, silence is abdication. India has long aspired to be more than a regional power; it has sought to serve as the conscience-keeper of the world. That stature was built on a willingness to speak for sovereignty, peace, non-violence and justice even when doing so was inconvenient. At this moment, there is an urgent need for us to rediscover that moral strength and articulate it with clarity and commitment.

The writer is chairperson, Congress Parliamentary Party and member of Rajya Sabha

## KEY HIGHLIGHTS

### Context of the News

- Iran confirmed the assassination of its Supreme Leader, Ayatollah Ali Khamenei, in targeted strikes allegedly carried out by the U.S. and Israel.
- The incident reportedly occurred during ongoing diplomatic negotiations.
- India did not directly condemn the assassination; instead, it expressed "deep concern" and called for dialogue.
- The development raises questions regarding:
  - Sovereignty and international law
  - Rules-based international order
  - India's strategic autonomy
  - India's balancing policy in West Asia

### Key Points

- Article 2(4) of UN Charter: Prohibits use of force against territorial integrity or political independence of any state.
- Article 51 of Indian Constitution: Promotion of international peace and security (DPSP).
- India imports ~85% of its crude oil requirement (Economic Survey).
- West Asia hosts ~8–9 million Indian diaspora (MEA data).
- Iran is strategically important for:
  - Chabahar Port (connectivity to Central Asia & Afghanistan)
  - Energy security
- India maintains strong defence ties with Israel.

### Static Linkages

- Principles of Sovereign Equality of States.
- Panchsheel Agreement (1954).
- Non-Aligned Movement: Strategic autonomy.

- Directive Principles – International peace.
- Energy security and sea lane protection.
- Diaspora evacuation operations (e.g., Operation Rahat).

### Critical Analysis

#### Strategic Concerns

- Balancing ties between Iran and Israel.
- Protection of Indian diaspora in Gulf.
- Stability of oil supply routes (Strait of Hormuz).

#### Normative Concerns

- Silence may dilute India's image as supporter of sovereignty.
- Impacts India's claim as voice of Global South.

#### Geopolitical Implications

- Escalation in West Asia may disrupt:
  - Energy imports
  - Maritime trade
  - Regional stability

### Way Forward

- Maintain principled stand on sovereignty and peaceful resolution.
- Strengthen multi-alignment without compromising strategic autonomy.
- Enhance energy diversification.
- Use diplomatic channels for de-escalation.
- Prioritize diaspora safety and contingency planning.

# Navigating volatile Af-Pak belt requires Delhi to be nimble



SHARAT SABHARWAL

**K**HAWAJA ASIF, Pakistan's defence minister, has said that his country is in the midst of an "open war" with Afghanistan because its patience has run out due to terror attacks from Afghan soil. Is war a solution to Pakistan's problems with Afghanistan? Has the Pakistani establishment forgotten that Afghanistan has been the graveyard of empires? Irony also died a thousand deaths when Pakistan expressed impatience with terror attacks against it.

At the core of the crisis is Pakistan's perennial desire to turn Afghanistan into a vassal state. The Taliban's victory in Afghanistan, hailed in Pakistan as a vindication of its policy, has turned into a nightmare. No longer dependent on Pakistan, the Taliban has charted an independent path. It does not recognise the Durand Line. Pakistan accuses it of providing sanctuary and support to the Tehreek-e-Taliban Pakistan (TTP). The Taliban denies the charge — it describes the TTP as Pakistan's internal problem, and accuses Islamabad of harbouring terrorists of its nemesis, the Islamic State-Khorasan Province. Afghan hostility compounds Pakistan's challenge in its volatile tribal belt.

The Taliban would prefer to avoid extensive attrition from the sky. But they have lived with extreme adversity, and so has Afghanistan for over 40 years now. Therefore, if the situation escalates, they would put up a fierce fight rather than yield ground

Pakistan has resorted to restrictions on the transit trade of landlocked Afghanistan, expelled a large number of Afghans and carried out periodic airstrikes in Afghanistan. Its hopes of exploiting fissures within the Taliban have been belied. The ongoing hostilities are the second, though more intense, major flare-up between the two countries in four months. Hostilities broke out in October last year following Pakistan's airstrikes in Afghanistan, but they ceased as a result of the efforts of friendly countries. However, the two sides failed to build upon the ceasefire. The trigger for the latest flare-up was provided yet again by Pakistan's airstrikes in Afghanistan close to the Durand Line, allegedly against militant hideouts. The Taliban said the attack had killed a large number of civilians. This was followed by a Taliban offensive against a large number of Pakistani posts in the border area. Pakistan upped the ante by launching Operation Ghazab-ill-Haq

and carried out airstrikes on targets in Kabul, Kandahar and some other areas.

An all-out military conflict is not in the interest of either party. Pakistan can cause considerable damage from the air, but cannot hope to succeed where the Soviets and US-led NATO forces failed. It is up against a very resilient foe. The Taliban would prefer to avoid extensive attrition from the sky. But they have lived with extreme adversity, and so has Afghanistan for over 40 years. If the situation escalates, they would put up a fierce fight rather than yield ground. Not a military match for Pakistan, their preference would be for covert operations and guerrilla tactics.

There have been calls for restraint from the international community. Apprehensive about the threat to its CPEC stakes, China tried its hand at mediation in the past, but failed. The Americans have leaned towards Pakistan. The US undersecretary of state for political affairs has offered condolences for the lives lost, adding that his country would continue to monitor the situation closely and support Pakistan's right to defend itself.

India has strongly condemned Pakistan's recent airstrikes in Afghanistan and reiterated its support for Afghanistan's sovereignty. Radicalisation and instability in Afghanistan and Pakistan have resulted from the internal dynamics of these countries and the short-sighted policies of major powers. India, however, has to deal with the consequences. Besides its civilisational links with the Afghan people, India has also remained their partner in development and against Pakistan's attempts to subjugate them. With the bad memory of the 1990s, when Pakistan used Afghan territory to engineer terror against it, India can not afford to cede strategic space in Afghanistan to hostile forces. Therefore, it has acted pragmatically to upgrade its engagement with the Taliban government. The situation in the Af-Pak belt remains volatile, and India will have to remain nimble-footed.

Sabharwal is India's former high commissioner to Pakistan and author of India's Pakistan Conundrum: Managing a Complex Relationship.

## Static Linkages

- Article 2(4) of UN Charter – Prohibition on use of force.
- State responsibility for non-state actors operating from its territory.
- Concept of strategic depth in geopolitics.
- Asymmetric warfare and guerrilla tactics.
- Refugee crisis and international humanitarian obligations.
- Buffer state theory in international relations.

## Critical Analysis

### Strategic Concerns

- Pakistan's long-standing "strategic depth" policy in Afghanistan has backfired.
- Taliban no longer dependent on Pakistan post-2021.
- Escalation risks prolonged asymmetric conflict.

### Security Dimensions

- TTP resurgence threatens Pakistan's internal stability.
- Radicalisation and militancy may spill over into South Asia.
- Increased instability near India's extended neighbourhood.

### Geopolitical Angle

- China concerned over CPEC security.
- U.S. balancing counter-terror priorities with regional strategy.
- India pursuing calibrated engagement with Taliban to safeguard interests.

### Limitations of Military Solution

- Afghanistan historically resisted external military domination (Soviet & U.S. experiences).
- Air superiority does not ensure long-term control.
- Guerrilla warfare favours Taliban.

## Way Forward

- Regional diplomatic engagement including SCO framework.
- Strengthening border management mechanisms.
- Intelligence cooperation against non-state actors.
- Political dialogue between Pakistan and Taliban.
- India to maintain pragmatic engagement while safeguarding security interests.
- Focus on humanitarian assistance and developmental outreach.

## KEY HIGHLIGHTS

### Context of the News

- Pakistan's Defence Minister Khawaja Asif termed the current hostilities with Afghanistan as an "open war".
- Pakistan accuses the Afghan Taliban regime of sheltering the Tehreek-e-Taliban Pakistan (TTP).
- Pakistan conducted airstrikes near the Durand Line, triggering Taliban retaliation.
- Taliban denies support to TTP and accuses Pakistan of backing Islamic State – Khorasan Province (ISKP).
- Escalation threatens regional stability and impacts India's strategic interests.

### Key Points

- Durand Line (1893): Drawn between British India and Afghanistan; Afghanistan historically disputes its legitimacy.
- TTP (2007): Militant organisation targeting the Pakistani state; distinct from Afghan Taliban.
- Taliban (2021): Regained control of Afghanistan after U.S. withdrawal.
- Pakistan has:
  - Conducted cross-border airstrikes.
  - Restricted Afghan transit trade.
  - Expelled Afghan refugees.
- China is concerned due to CPEC security.
- U.S. expressed support for Pakistan's counter-terror stance.
- India reiterated support for Afghan sovereignty.

# A war without a plan for the day after

WHILE THE killing of Iran's Supreme Leader, Ayatollah Ali Khamenei, represents a big blow to the clerical establishment, it may or may not be an irreversible setback for the regime. The US and Israel, whose stated aim is regime change — notwithstanding Secretary of War Pete Hegseth's prevarication Monday that "this is not a regime change war, but the regime sure did change" — seem to be betting on intensive airstrikes while exhorting the Iranian people to complete it on the ground. This strategy may overlook the resilience of the deeply entrenched authoritarian system designed to withstand external pressures. This is particularly so in Iran, where powerful institutions are controlled by the Islamic Revolutionary Guard Corps (IRGC). Trump's America may be about to learn that removing a leader as powerful as Khamenei is not the same thing as reshaping a country's future. While its action in Iran appears, especially, to be an escalation without a plan, this is a lesson that America has failed to learn even earlier.

President Trump has established a formidable track record of acting unilaterally, without consultation with domestic and foreign stakeholders. His imposition of global tariffs, his threats against Greenland, and his attempt to cut deals with Russian President Vladimir Putin on Ukraine, are part of this pattern. In the case of Iran, there is no indication that he is stitching up a coalition or partnering with alternative power centres inside the country. He must know that a scenario akin to the capture of Nicolás Maduro in Venezuela, succeeded by a regime acceptable to the White House, is unlikely. Iran is a much larger and militarily stronger state with a network of regional proxies and, domestically, the deeply embedded ideological force of the IRGC, whose singular mission is to defend the 1979 revolution. The question, then, is whether the US and Israel have waged a war without a plan for the day after, one that risks breaking a country and leaving recovery and repair steeped in uncertainty.

Trump portrays himself as a president of peace, yet since he returned to office last year, his administration has bombed seven countries. His claims of ending wars are embedded in exaggeration or falsehood. America's historical record in engineering regime change is troubling: In recent history, Afghanistan, Iraq and Libya were torn apart by US-led interventions and continue to grapple with instability. Ironically, one of Trump's earliest political stances was a scathing critique of George W Bush's war in Iraq, a war that had bipartisan support in the US Congress. This isn't the case here: Democrats and the MAGA base are opposed to the Iran campaign. Trump helms a situation he once condemned unequivocally. As new fronts open and fires spread across the region, in cities that pride themselves as the new cosmopolitan centres, from Dubai to Abu Dhabi and Doha, the absence of a plan has a terrible daily cost.

## KEY HIGHLIGHTS

### Context of the News

- The Supreme Leader of Iran, Ali Khamenei, was reportedly killed in targeted airstrikes carried out by the United States and Israel.
- The action is perceived as an attempt at regime destabilisation/change.
- Iran's political system is deeply institutionalised, with real power concentrated in the Supreme Leader and the Islamic Revolutionary Guard Corps (IRGC).
- The escalation has raised concerns of regional spillover across West Asia and disruption of global oil supply chains.
- The move reflects a pattern of unilateral interventions under President Donald Trump.

### Key Points

- Iran's Governance Structure
  - The Supreme Leader is the highest authority under Iran's Constitution (post-1979 Islamic Revolution).
  - Controls armed forces, judiciary, intelligence, and key state institutions.
- Islamic Revolutionary Guard Corps (IRGC)
  - Established in 1979 to protect the Islamic Revolution.
  - Parallel military structure alongside the regular army.
  - Strong economic and political influence within Iran.

- Strategic Significance
  - Strait of Hormuz connects Persian Gulf to Gulf of Oman.
  - Nearly one-fifth of global crude oil trade passes through it (Energy security relevance for India).
- US Record of Regime Change Interventions
  - Afghanistan (2001), Iraq (2003), Libya (2011) — long-term instability followed.

### Static Linkages

- Principle of sovereign equality of states (UN Charter, Article 2(1)).
- Prohibition on use of force except in self-defence or UNSC mandate (Article 51).
- Balance of power theory in international relations.
- Energy imports and Current Account Deficit sensitivity to crude oil prices.
- Diaspora protection and evacuation diplomacy (e.g., past evacuation operations).

### Critical Analysis

#### Strategic Concerns

- Regime removal ≠ regime transformation (institutional resilience of IRGC).
- Risk of proxy retaliation across West Asia (Lebanon, Syria, Iraq, Yemen).
- Possibility of oil supply disruption impacting global inflation.
- Escalation may strengthen hardliners within Iran instead of weakening regime.

#### Legal & Normative Issues

- Question of legality under international law without UN mandate.
- Undermines multilateralism and collective security framework.
- Sets precedent for targeted elimination of heads of state.

#### India's Concerns

- Energy security dependence on West Asia.
- Safety of Indian diaspora in Gulf countries.
- Impact on Chabahar Port connectivity projects.

### Way Forward

- Revival of diplomatic channels and multilateral negotiations.
- Strengthening role of UN Security Council in conflict resolution.
- De-escalation mechanisms involving regional powers (Gulf states).
- India to adopt balanced diplomacy preserving ties with US, Israel, and Iran.
- Diversification of crude oil sources to reduce vulnerability.

# After strikes on Iran, expanding theatre of conflict in West Asia

Rishika Singh  
New Delhi, March 2

MISSILES CONTINUED to fly across West Asia on Monday, as the US and Israel bombed Iran and it retaliated, aiming for US military bases that dot the region.

Bahrain, Kuwait, Qatar, and the UAE have all been impacted, shattering the calm these countries have enjoyed so far, insulated from their volatile surroundings and emerging as a destination of choice for expats from around the world.

## Iran's confirmed targets

Iran's strikes have been aimed at Israel, Kuwait, Qatar, Jordan, Bahrain and the UAE. In many regions, debris and injuries have been attributed not to the attacks but to the interceptors thwarting them. Some major hits include:

### US Navy's 5th Fleet headquarters,

**Bahrain:** The AP reported that the island kingdom of Bahrain said one person was killed by shrapnel from an intercepted missile. Home to the US Navy's 5th Fleet, Bahrain said it intercepted 61 missiles and 34 attack drones.

Ships rotationally deploy here from the



Pacific and Atlantic Fleets. The area of responsibility for the fleet encompasses about 2.5 million square miles and includes the Arabian Gulf, the Gulf of Oman, the Red Sea, and the Arabian Sea. It includes critical choke points at the Strait of Hormuz and the Suez Canal.

**Aramco refinery, Saudi Arabia:** The Saudi Arabian state oil company, the largest in the world, temporarily shut down its major Ras Tanura oil refinery near Dammam on the Persian Gulf after Iranian

drones targeted it. Saudi state TV reported no casualties from the fire at the refinery.

**US jets shot down in Kuwait:** CNN reported that three US fighter jets were accidentally shot down by Kuwaiti air defenses in a "friendly fire incident," citing the US military.

**AL Jazeera** also cited the Kuwaiti Defence Ministry, which said that the Al al-Salem Air Base came under attack by several ballistic missiles, which were all intercepted. One death was reported on Sunday. At least three US service personnel have also died.

**Energy facilities, Qatar:** Qatar's Defence Ministry said two drones struck energy facilities in Ras Laffan. **Bloomberg** reported that state-owned petroleum company QatarEnergy ceased LNG production after the attacks. Notably, LNG imports accounted for 50% of India's overall imports from Qatar in 2024.

**Palm Jumeirah, Burj Al Arab and Dubai airport:** Explosions were reported at the luxury hotel. Drone debris caused a fire at the hotel, the AFP reported. Three people were reported dead in the UAE.

## Why these targets

Unlike past conflicts, the widening

spread of attacks suggests an Iran under great pressure, with President Masoud Pezeshkian describing Khamenei's killing as "a great crime".

Iranian Foreign Minister Abbas Araghchi, in a letter to the UN on Saturday, said they would utilise "all necessary defensive capabilities and measures" to counter the US-Israeli attacks. "Consequently, all bases, facilities, and assets of hostile forces in the region are considered legitimate military targets. Iran will exercise this inherent right decisively until the aggression is completely and unequivocally halted," he wrote.

He also told *Al Jazeera*, "We are not attacking our neighbours in the Persian Gulf countries, we are targeting the presence of the US in these countries."

Notably, Oman, which had so far been negotiating US-Iran talks, announced Sunday that the Duqm commercial port was targeted by two drones, injuring one worker. Oil tankers have also been reportedly hit.

Experts also believe that Iran is trying to exert pressure enough so that these countries can prevail upon the US to arrange for a ceasefire. Turkey also has a major US military air base, but a direct attack on Turkey can get NATO involved.

## KEY HIGHLIGHTS

### Context of the News

- The United States and Israel launched coordinated strikes on Iran following the assassination of Ayatollah Ali Khamenei.
- Iran retaliated by targeting US military bases and strategic infrastructure across Gulf countries.
- Missile/drone attacks affected Bahrain, Kuwait, Qatar, United Arab Emirates, Jordan, and oil facilities in Saudi Arabia.
- Strategic maritime chokepoints like the Strait of Hormuz and the Suez Canal are under threat.
- Qatar temporarily halted LNG production at Ras Laffan after drone strikes.

### Key Facts

- US 5th Fleet is headquartered in Bahrain; oversees Arabian Gulf, Red Sea, Gulf of Oman, Arabian Sea.
- Strait of Hormuz: ~20% of global oil trade passes through.
- India imports ~85% of its crude oil needs (Economic Survey).
- Qatar is among India's largest LNG suppliers (~40-50% of India's LNG imports in recent years).
- Article 51 of the UN Charter recognizes the inherent right of self-defence.
- Turkey is a NATO member – attack on it may trigger NATO's collective defence (Article 5).

### Static Linkages

- Strategic chokepoints in world geography.
- Energy security and balance of payments vulnerability.
- Freedom of navigation under UNCLOS.
- Diaspora protection policy (Operation Raahat, Operation Ganga – evacuation precedents).
- Collective security vs. unilateral military action.

## India's Concerns

- Energy Security: Disruption in oil/LNG supply → inflationary pressures.
- Indian Diaspora: ~9 million Indians reside in Gulf countries.
- Maritime Trade: West Asia is crucial for India-Europe trade routes.
- Remittances: Gulf region is a major contributor to India's remittance inflows.

## Critical Analysis

### Strategic Implications

- Expansion of conflict beyond Iran-Israel to Gulf states.
- Increased militarisation of energy infrastructure.
- Risk of closure/blockade of Strait of Hormuz.

### Economic Implications

- Rising crude prices → CAD widening.
- LNG supply disruption → power and fertilizer sector impact.
- Insurance and freight costs likely to increase.

### Diplomatic Dimensions

- Pressure on Gulf monarchies to balance US security ties and regional stability.
- Weakening of mediation efforts by Oman and other neutral states.
- Possible UNSC deadlock due to P5 divisions.

## Way Forward

- Diversification of energy sources (Strategic Petroleum Reserves, renewables).
- Strengthening I2U2, India-Gulf strategic partnerships.
- Enhancing maritime domain awareness in Arabian Sea.
- Diplomatic balancing: maintaining ties with US, Israel, and Gulf states.
- Evacuation preparedness for Indian nationals.