



DAILY NEWS PAPER ANALYSIS

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Iran threatens 'to halt all regional oil exports'

Oil and gas 'will either be for everyone or for no one', says Iran amid 'wave of strikes' by the U.S.

Blockade by U.S. has 'dismantled' the peace MoU, says Tehran; Brent crude price nears \$85 a barrel

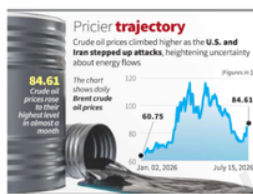
Unless stocks are replenished, the world will be poorly equipped for the next shock, analysts say

Agence France-Presse
TEHRAN/WASHINGTON

Returning to war nearly a month after signing a memorandum of understanding towards peace in West Asia, the U.S. and Iran on Wednesday launched strikes on targets across the region.

While the U.S. Central Command said it launched "a wave of strikes... designed to further degrade military capabilities Iranian forces have used to attack commercial shipping in the Strait of Hormuz", Iranian state media reported explosions near the port city of Bandar Abbas, on the island of Qeshm, and on Bandar Imam Khomeini. Iranian media later said new U.S. strikes hit the

southern port city of Bushahr, home to the country's only civilian nuclear plant. Iran's Revolutionary Guards said they targeted the U.S. Fifth Fleet in Bahrain, where the military said it had intercepted attacks against civilian targets, while Jordan's armed forces said they had downed three missiles from Tehran. Deputy Foreign Minister of the Islamic Republic, Kazem Gharibabadi, said the renewed U.S. blockade on Iranian ports "has, in a way, dismantled the Islamabad memorandum", referring to the interim deal reached last month to halt hostilities and pursue peace talks. The Guards also threatened on Wednesday to halt all energy exports from West Asia over the



U.S. blockade: "The export of oil and gas from the region will be either for everyone or for no one," it said. The Brent crude oil, the international standard, traded close to \$85 a barrel on Wednesday - more than 15% higher than the

price before the war, but still well below the nearly \$120 reached at the height of the conflict. Analysts with the International Monetary Fund (IMF) have warned that while a surplus of oil had kept prices low, "much of that room has now been used up."

"As tensions flare again in the Strait of Hormuz, that room [from oil surplus] is now smaller and shrinking further as spare capacity has been deployed, demand has compressed, and inventories have been drawn down," Azim Sadikov and Jean-Marc Natal from the IMF wrote in a blog post. "Unless inventories are replenished, the world will start from a weaker position when the next shock comes."

At the heart of the resumption of hostilities has been the dispute over the Strait of Hormuz, a waterway that is crucial for global oil and gas flows.

Iran blockaded the strait after the U.S. and Israel launched their massive attack on February 28, using

it for leverage against its foes for months before briefly reopening it, and then again vowing it would be closed "until the U.S. ends its aggression".

The U.S., in turn, has reimposed its own blockade of Iran's ports, though Mr. Trump has backed down on a planned 20% levy on ships using the strait.

In Tehran, there was no sign of a return to conflict, with Iranians thronging cafes to watch the France-Spain FIFA World Cup semi-final in huge crowds on Tuesday night.

Since the war began, Iran has asserted its control over the Strait of Hormuz and opened fire on ships for taking routes it says are unauthorised.

"The retaliatory operations of the fighters will

continue, and the Strait of Hormuz will remain closed until the United States ends its acts of aggression," the Guards have said.

A Norwegian tanker was hit by an explosion caused by an unidentified device off the Omani coast early Tuesday, the crisis response company MTI Network said.

Kuwait said one of its naval vessels was struck during an Iranian missile and drone barrage, wounding four crew members.

Since last week, renewed U.S. attacks have killed at least 30 people in Iran, government spokesperson Fatemeh Mohajerni said. Separately, the military announced that seven of its personnel were killed in Wednesday's strikes on the southeast.

- IMF cautioned that declining spare production capacity and oil inventories increase vulnerability to future supply shocks.

Static Linkages

- UNCLOS, 1982
 - Strait of Hormuz is an international strait.
 - Ships enjoy the right of Transit Passage through international straits.
- India's Energy Security
 - India imports nearly 85% of its crude oil requirement.

- West Asia remains India's largest source of crude oil imports.

- Strategic Petroleum Reserves (SPR)
 - Maintained to reduce the impact of global supply disruptions.
- Mission-Based Deployments
 - Indian Navy maintains continuous deployment in the Gulf of Oman, Arabian Sea, and adjoining waters to safeguard maritime interests.
- Other Important Maritime Chokepoints
 - Bab-el-Mandeb
 - Suez Canal
 - Strait of Malacca

Critical Analysis

Significance

- Strait of Hormuz is the most critical oil transit chokepoint in the world.
- Stability in West Asia is essential for global energy markets.
- Directly influences India's inflation, current account deficit (CAD) and energy security.
- Demonstrates the strategic importance of maritime security in the Indian Ocean Region (IOR).

Challenges

- Closure of the Strait may sharply increase crude oil and LNG prices.
- Rising freight and insurance costs can disrupt global supply chains.
- Threatens the safety of Indian merchant vessels and diaspora in West Asia.
- Prolonged conflict may increase global inflation and slow economic growth.
- Greater involvement of external powers may widen regional instability.

Way Forward

- Promote peaceful resolution through dialogue under the United Nations.
- Ensure freedom of navigation under UNCLOS.
- Diversify India's crude oil and LNG import sources.
- Expand Strategic Petroleum Reserves (SPR).
- Accelerate renewable energy and Green Hydrogen to reduce import dependence.
- Strengthen maritime surveillance and naval cooperation in the Indian Ocean Region.

KEY HIGHLIGHTS:

Context

- The U.S. and Iran resumed military hostilities after the collapse of the Islamabad Memorandum, which had temporarily halted conflict in West Asia.
- The U.S. conducted strikes on Iranian military targets, citing threats to commercial shipping in the Strait of Hormuz.
- Iran retaliated by targeting the U.S. Fifth Fleet (Bahrain) and threatened to block energy exports through the Strait of Hormuz.
- The renewed conflict has revived concerns over global energy security, maritime trade, and its impact on India's economy and strategic interests.

Key Facts

Strait of Hormuz

- Location: Between Iran (North) and Oman & UAE (South).
- Connects: Persian Gulf → Gulf of Oman → Arabian Sea.
- It is one of the world's most strategic maritime chokepoints.

Global Significance

- Carries around 20% of global petroleum liquids consumption (~20 million barrels/day). (U.S. EIA)
- Nearly 20% of global LNG trade, mainly from Qatar, passes through it.
- Major oil exporters using the route:
 - Saudi Arabia
 - Iraq
 - Kuwait
 - UAE
 - Qatar
 - Iran

Strategic Importance

- Headquarters of the U.S. Fifth Fleet is located in Bahrain.
- Brent crude rose to around \$85/barrel following renewed tensions.

Leak of Kudankulam nuclear plant data sparks 'commotion'

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TIRUNELVELI

The leak of highly sensitive files of Kudankulam Nuclear Power Plant (KKNPP), reportedly accessed by a ransomware group from a contractor's server, has triggered "absolute commotion" in the plant, KKNPP sources said on Wednesday.

After commissioning two 1,000 Mwe VVER reactors, KKNPP is building four more such units with Russian collaboration.

Sources said the top brass of the upcoming nuclear park is "completely clueless" about the development that poses security threat as it may let an adversary map the support system and identify vulnerabilities.

According to Reuters, more than 19,000 files dating between 2016 and mid-2025, and linked to KKNPP's engineering blueprints on control, cooling and ventilation systems, list of vendors and suppliers, etc. had been accessed by World Leaks.

Nuclear Power Corporation of India Limited said the information claimed to be available in public domain pertains to "conventional balance of plant common service facilities" and does not relate to any nuclear safety or nuclear

security-related systems.

The leak originated from a server hosted by third party provider Yotta. The plant's contractor, Anil Ambani's Reliance Group, has admitted that a "partial breach" had happened and the government had been informed.

"Suspicious activity on Yotta's server was noted on May 29 last and it was reported in June-end. Investigations by Nuclear Power Corporation of India Limited (NPCIL), the project proponent, and Computer Emergency Response Team are on," the sources said.

When the KKNPP encountered a similar incident in 2019, wherein a North Korean malware infection on its administrative network exposed the plant's vulnerability, NPCIL had dismissed it saying their "unbreachable standalone network" was intact and no data could be accessed by any dark web.

Neither KKNPP's site director Ashok Bhatiya nor V.P. Sunil, Station Director (1 and 2), could be reached for their comments on this sensitive issue.

Senior manager of human resources and public relations Kannan, who usually keeps in touch with the media for occasional press statements, also did not pick up repeated calls.

- Under Construction: 4×1000 MW.
- Total Planned Capacity: 6000 MW (India's largest nuclear power plant).

VVER Reactor

- Russian-designed Pressurized Water Reactor (PWR).
- Equipped with:
 - Double containment
 - Passive safety systems
 - Core catcher
- Uses light water as both coolant and moderator.

Balance of Plant (BoP)

Includes non-nuclear infrastructure such as:

- Cooling system
- Ventilation
- Turbines
- Transformers
- Water treatment system
- Electrical distribution network

(BoP is separate from the reactor core and nuclear safety systems.)

CERT-In

- National cyber incident response agency.
- Established under Section 70B of the Information Technology Act, 2000.
- Functions under Ministry of Electronics & Information Technology (MeitY).

NCIIPC

- National Critical Information Infrastructure Protection Centre.
- Functions under NTRO.
- Nodal agency for protection of Critical Information Infrastructure (CII) under Section 70A of the IT Act, 2000.

Static Linkages

- India follows a Three-Stage Nuclear Power Programme proposed by Dr. Homi J. Bhabha.
- Atomic Energy Act, 1962 regulates peaceful use of atomic energy.
- Civil Liability for Nuclear Damage Act, 2010 governs compensation for nuclear damage.
- IAEA promotes peaceful use and safety of nuclear energy.
- India is a party to the Convention on Nuclear Safety (CNS).
- Nuclear power contributes to India's Net Zero by 2070 and energy security objectives.

Critical Analysis

Significance

- Highlights cyber vulnerabilities in India's Critical Information Infrastructure (CII).

KEY HIGHLIGHTS:

Context

- A ransomware group reportedly accessed 19,000+ files (2016–2025) related to Kudankulam Nuclear Power Plant (KKNPP) through a third-party contractor's server.
- The leaked documents reportedly include engineering drawings, cooling and ventilation systems, vendor details and support infrastructure.
- NPCIL clarified that the leaked information pertains only to Balance of Plant (BoP) common service facilities and not to reactor safety or nuclear security systems.
- The incident is being investigated by CERT-In and NPCIL.
- It follows the 2019 Kudankulam malware incident, highlighting cyber threats to India's critical infrastructure.

Key Facts

Kudankulam Nuclear Power Plant (KKNPP)

- Location: Tirunelveli district, Tamil Nadu.
- Operator: Nuclear Power Corporation of India Limited (NPCIL).
- Administrative Control: Department of Atomic Energy (DAE).
- Collaboration: India–Russia.
- Reactor Type: VVER-1000 (Pressurized Water Reactor - PWR).
- Fuel: Low Enriched Uranium.
- Moderator & Coolant: Light Water.
- Operational Units: 2×1000 MW.

- Emphasizes the importance of securing third-party vendors and supply chains.
- Reinforces the need for cyber resilience in strategic sectors like nuclear energy.

Challenges

- Increasing ransomware attacks on critical infrastructure.
- Third-party contractor vulnerabilities.
- Protection of Operational Technology (OT) and Industrial Control Systems (ICS).
- Shortage of specialised cyber-security manpower.
- Balancing digitalisation with national security.

Way Forward

- Strengthen Zero Trust Cyber Security Architecture in strategic installations.
- Conduct mandatory cyber audits of all contractors and vendors.
- Enhance coordination among CERT-In, NCIIPC, NPCIL and NTRO.
- Regular red-team exercises and penetration testing.
- Promote indigenous secure hardware and software for critical infrastructure.
- Implement IAEA Nuclear Security guidelines and continuous cyber risk assessment.

Echoes of Karbala, Iran beyond the shadows of war

Finally, the cat is out of the bag. With the United States President Donald Trump first announcing a 20% surcharge for facilitating the passage of commercial shipping through the Strait of Hormuz, and now shifting the focus to investments in America ("Trade and Investment Deals that the various Gulf States will be making into the United States"), the "art of the deal" has been laid bare. The war with Iran was never about democracy, human rights, or non-proliferation; those are merely pretexts to control Iran's vast energy reserves and the strategic choke points of global trade. But behind the sterile headlines of geopolitics lies a human reality. I wish to share something far more personal: my experience of stepping into Iran at one of the most extraordinary, painful moments in its modern history.

Late in the evening on July 1, I was deeply moved and, frankly, astounded, to receive an invitation, extended on behalf of the Rebhaz, Ayatollah Mojtaba Khamenei, to attend the funeral ceremonies of his father, the late Supreme Leader Ayatollah Seyyed Ali Khamenei. The invitation came suddenly, everything - from the visa and booking the flights to arranging the state protocols - moved with breathless speed. My eldest daughter, Irina, was gripped by fear when she heard the news. Aware of my outspoken stance on Gaza and concerned about the dangers of travelling to Iran, she only calmed down after extracting a promise from me that I would return as soon as the ceremonies were over. Within hours, I was aboard a Mahan Air flight bound for Tehran.

The real Iran
Landing in Tehran, I braced myself for an atmosphere thick with fear and wartime paralysis. Instead, I stepped into a scene of profound, composed calm. The officials who received us were polite, orderly, and reassuring. The airport's VIP lounge bustled with diplomats and leaders from across the globe. Former Union Minister Salman Khurshid and several distinguished spiritual leaders from India were on my flight. It gradually dawned on me that I was the only female political leader invited from India, and a Sunni woman at that. In a region so often fractured by sectarian divides, this gesture of inclusive solidarity made the honour all the more profound.

From the airport to our hotel, the meticulous



Mehbooba Mufti
President,
Jammu and Kashmir
Peoples Democratic
Party (JKPDP)

organisation was striking. There was no chaos, no frantic mobilisation. No one looking at the quiet, efficient streets would have believed that this was a country living under the constant threat of annihilation. Upon reaching the hotel, after being warmly welcomed, a young Iranian woman in a flowing black abaya was assigned to guide me, attending to my every need with effortless grace. But what shattered my preconceptions most was the sheer presence of women in the public arena. On every corner, I saw female journalists, broadcasters, and camera operators, clad in abayas and headscarves, interviewing international delegates with fierce professional confidence. I have long known of Iran's high female literacy rates and the prominence of women in universities, medicine, and education. Yet, seeing them command the media landscape stood in stark, defiant contrast to the western caricature of the silent, sequestered Iranian woman.

A grief beyond words

The next day remains permanently etched in my soul. We were taken to pay our final respects before the coffins of the late Ayatollah and his family.

Nothing prepared me for the sight of the tiny coffin of 44-month-old Zahra Mohammadi Golpovgani, placed gently beside her grandfather. Her photograph, showing her with a pacifier still in her mouth, was a devastating testament to stolen innocence. As I looked at her, my heart broke, and my thoughts instantly turned to the thousands of children pulled from the rubble of Gaza - children whose faces are rarely shown on western screens.

For a Muslim, the scene was an agonising echo of Karbala, where the innocent and the young were denied even water and martyred. Thirteen centuries later, it felt as though the tragedy of Karbala had returned to the banks of the Tigris and the streets of Tehran. It was a grief too profound for words.

Yet, even in this state of national mourning, the dignity of the Iranian people was breathtaking. It reminded me that this is not merely a modern state, but a civilisational giant thousands of years old, carrying its sorrow with poetic elegance.

During my stay, I visited the Husayniyah jamaran in Tehran, the historic prayer hall and home of the founder of the Islamic Republic, Ayatollah Ruhollah Khomeini. Standing inside that simple, three-room apartment was a deeply

humbling experience. It is a place where the walls do not speak of luxury, but of faith and immense sacrifice. How rare it is to see a global leader live in such austerity while wielding absolute power. One cannot help but contrast this humility with the ostentatious and hedonistic lifestyles of some leaders in neighbouring Muslim countries, whose extravagance surpasses even that of many billionaires in the West.

It was during these quiet moments of observation that I truly understood why Kashmir has historically been called Iran-e-Sagheer, or Little Iran. The cultural threads are woven tight: in the spice of our food, the cadence of our languages, the curves of our architecture, and the protective, immediate warmth with which strangers are welcomed into a home.

I saw this warmth reflected in the vibrant diversity of everyday Tehran. Women dressed as they pleased: some in strict black chadors, others in colourful headscarves paired with jeans, and young women riding scooters with their hair catching the breeze. They spoke freely, argued passionately, and occupied public spaces with confidence. At an official state function, I met two female Iranian parliamentarians. They sat confidently in the very front row, side by side with the country's highest leadership.

Once again, the monochromatic, oppressive image projected by the West crumbled before my eyes.

Resilience beyond the battlefield

What I took home with me was not the political posturing of empires, but the quiet, steel-like resilience of ordinary Iranians. This is a society that has lived under the crushing weight of sanctions and the threat of war for decades. Yet, their streets are spotless, their universities thrive, and their people walk with an unyielding, quiet pride.

They are a testament to the fact that nations cannot be understood through television screens, geopolitical rhetoric, or satellite imagery. I returned to Kashmir with a heavy heart, but with an enduring truth: beyond the smoke of war, there lives a beautiful, ancient society determined to preserve its dignity, its culture, and its humanity, even in the darkest of times.

The only regret I carried back from Iran was that, because of my packed schedule, I could not visit some of its most revered shrines. Perhaps it was not meant to be this time. I will return to visit these blessed sanctuaries in better times.

KEY HIGHLIGHTS:

Context of the News

- An opinion article based on a visit to Iran amid heightened U.S.–Iran tensions highlighted the country's resilience despite sanctions and conflict.
- The developments have renewed focus on Iran's geopolitical importance, Strait of Hormuz, India's energy security, and India's strategic interests in West Asia.
- For UPSC, the issue is important from the perspectives of International Relations, Energy Security, Maritime Security, and India's Connectivity Initiatives.

Key Points

- Iran
 - Capital: Tehran
 - Currency: Iranian Rial
 - Located in West Asia.
 - Shares borders with Iraq, Türkiye, Armenia, Azerbaijan, Turkmenistan, Afghanistan and Pakistan.
 - Bounded by the Caspian Sea (North) and Persian Gulf & Gulf of Oman (South).
- Strategic Importance
 - Holds one of the world's largest crude oil and natural gas reserves.
 - Serves as a gateway connecting West Asia, Central Asia and the Caucasus.
 - Controls the northern coast of the Strait of Hormuz.
- Strait of Hormuz
 - Connects the Persian Gulf with the Gulf of Oman and Arabian Sea.
 - One of the world's most important maritime choke points.

- Around 20% of global petroleum liquids trade passes through it (U.S. Energy Information Administration).
- India-Iran Relations
 - Iran is crucial for India's:
 - Energy Security
 - Connectivity with Afghanistan and Central Asia
 - Regional strategic balance.
 - Chabahar Port provides India access to Afghanistan and Central Asia bypassing Pakistan.
 - Connected with the International North-South Transport Corridor (INSTC).
- India's Policy
 - Strategic Autonomy
 - Multi-alignment
 - Support for freedom of navigation.
 - Peaceful resolution of disputes.
 - Respect for sovereignty and territorial integrity.

Static Linkages

- Chabahar Port is India's only overseas port project.
- INSTC connects India-Iran-Caspian Region-Russia-Europe.
- Strait of Hormuz is an international maritime choke point.
- Maritime choke points significantly influence global energy prices.
- Economic sanctions affect trade, banking, shipping and investments.
- India's crude oil imports are highly dependent on West Asian countries.

Critical Analysis

Significance

- Ensures India's energy security.
- Supports India's Connect Central Asia Policy.
- Strengthens India's strategic presence through Chabahar Port.
- Enhances regional connectivity via INSTC.
- Maintains India's balanced diplomacy in West Asia.

Challenges

- U.S. sanctions restrict economic engagement.
- Regional conflicts threaten oil supply chains.
- Disruption of the Strait of Hormuz can increase global crude prices.
- Geopolitical rivalry affects India's strategic flexibility.

Way Forward

- Strengthen India's policy of strategic autonomy.
- Expedite operationalisation of Chabahar Port and INSTC.
- Diversify energy import sources while maintaining engagement with Iran.
- Enhance maritime security cooperation in the Indian Ocean Region.
- Support diplomatic solutions for regional stability.
- Expand strategic petroleum reserves to mitigate supply disruptions.

Iran's disruptive strategy, its global consequences

Iran's recent actions over the Strait of Hormuz and its strategy of targeting its neighbours in the Gulf as retribution for the actions of the United States may seem to have been operational masterstrokes. However, in the long run, they may well prove to be strategic blunders that have antagonised the world at large and leave Iran out of the global mainstream and away from the path of sustained economic progress.

A strategy of disruption
For decades, Iran has overlaid its hand in presenting itself as standing up to what it has termed "continued Western imperialism" and in supporting the Palestinian cause through the lens of Islamic resistance – a policy that was not endorsed by most other developed and developing Islamic nations. As the Islamic regime in Iran grew in power, buoyed by its success in standing up to a powerful Iraq during the Iran-Iraq war that stretched through the 1980s, so too did its frustration at being unable to deliver telling blows against the "Big Satan-Little Satan" combination, as it referred to the U.S. and Israel, respectively.

Consequently, it engineered the second phase of its disruptive strategy in the late 1990s by developing and supporting proxies such as the Hezbollah, Hamas and Houthis, commonly known as the Axis of Resistance, and liberally endorsed their use of terrorism to cause widespread disruption in the region.

Here again, the Iranians have achieved much tactical success over the last two decades and kept West Asia on tenterhooks, but at a much larger level, it has widened the chasm that exists between itself and the rest of the world barring Russia, China and North Korea. It is this quartet which is shaping the trajectory of fundamentally disruptive resistance to the existing global order. When you compare this with the orderly way



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in which countries such as India are also challenging the existing global order with a call for greater multilateralism through dialogue and consensus, one can clearly figure out Iran's disruptive path.

Notwithstanding much assertion of civilisational and cultural linkages, India has maintained a steady transactional relationship with the Islamic Republic of Iran, revolving principally around energy flow, trade corridors and the Chabahar port. Much in tune with its foreign policy of multilateralism in a multi-polar world, it managed to navigate the sanctions regime imposed on Iran by the West and maintained some energy flow based on national interest till it found alternate means and then gradually reduced its import of Iranian crude.

India's approach

India has only modest diplomatic leverage with Iran and rightly chose not to position itself as an interlocutor during the recent conflict, preferring instead to resort to quiet back-channel diplomacy and frequent calls for restraint. India co-sponsored the UN Security Council Resolution 2817 (2026), which officially condemned Iran's military attacks and aggressive actions against the Gulf Cooperation Council (GCC) nations and Jordan. Adopted on March 11, 2026, the resolution demanded that Iran immediately cease all attacks and threats, particularly those targeting international navigation through the Strait of Hormuz.

Iran has no doubt been emboldened by its ability to withstand months of the U.S.-Israel bombing campaign. It has come out of the conflict battered and embittered but still standing. With large portions of its military capacity still intact and a regime in power that seems to be now dominated by a combination of the Islamic Revolutionary Guard Corps (IRGC)

and hard line clerics, it appears that the region can expect continued acts of isolated belligerence that stay below the threshold of conflict. The frenzy of stage-managed grief and genuine hatred towards the U.S. and Israel that was on display on the streets of Tehran for the funeral of its slain leader, Ali Khamenei does not augur well for the future.

Iran's proposal to levy 'special rates' on friendly countries for transit through the Strait of Hormuz is another disruptive attempt at preventing any collective action from energy-hungry countries eager to benefit from this offer.

More recently, Iran's strikes on tankers following the Omani route through the Strait of Hormuz highlight its propensity to engage in coercive brinkmanship. Such an environment is highly unsettling for a large part of the world including India for obvious reasons – energy and trade corridors running through a volatile geopolitical arena.

The choice before Iran

It is time that collective pressure from countries other than the West starts building on Iran to desist from its varied coercive methods to keep the region on the edge. As the U.S.'s appetite to remain embroiled in the conflict wanes and wanes, and Israel strains to 'finish off the job it started', Iran needs to take a step back and not overplay the advantageous geopolitical hand it currently holds.

As a first step, it must look for windows to extract legitimate leverage accruing from the proposed de-freighting of its assets and widening energy flow from its embattled oil fields and refineries. Despite its isolation from the West, Iran is categorised as an upper-middle-income economy and has much potential for rapid growth, should it desire so for its people.

- Supply-chain disruptions.

India's Position

- Follows Strategic Autonomy and Multi-alignment.
- Supports:
 - Peaceful dialogue.
 - Freedom of navigation.
 - Respect for international law.
- Strategic interests include:
 - Chabahar Port
 - International North-South Transport Corridor (INSTC)
 - Energy security.

Static Linkages

- Strait of Hormuz as a global maritime chokepoint.
- UNCLOS – Transit Passage through international straits.
- Sea Lines of Communication (SLOCs).
- Energy Security.
- Strategic Petroleum Reserves (SPR).
- SAGAR (Security and Growth for All in the Region).
- Chabahar Port.
- International North-South Transport Corridor (INSTC).
- Gulf Cooperation Council (GCC).

Critical Analysis

Significance

- Demonstrates the strategic importance of maritime chokepoints.
- Highlights energy security as a component of national security.
- Reinforces the importance of strategic autonomy in India's foreign policy.

Concerns

- Threatens freedom of navigation.
- Increases geopolitical instability in West Asia.
- Escalates global crude oil prices.
- Raises shipping and insurance costs.
- Disrupts global supply chains.
- Affects India's energy and trade security.

Challenges for India

- Dependence on West Asian energy imports.
- Protecting Indian diaspora in the Gulf.
- Balancing ties with Iran, Israel, GCC countries and the U.S.
- Ensuring uninterrupted operation of Chabahar Port and INSTC.

Way Forward

- Diversify crude oil import sources.
- Expand Strategic Petroleum Reserves.
- Strengthen maritime security and naval presence in the Indian Ocean.
- Promote peaceful diplomatic engagement in West Asia.
- Enhance renewable energy and green hydrogen adoption.
- Operationalise INSTC and Chabahar to improve connectivity.
- Uphold UNCLOS and freedom of navigation.

KEY HIGHLIGHTS:

Context

- Iran has recently intensified its coercive actions in the Strait of Hormuz, including attacks on commercial shipping and threats to restrict maritime transit.
- The developments follow the U.S.-Israel military strikes on Iran and have heightened tensions in West Asia, raising concerns over global energy security and freedom of navigation.
- The crisis has significant implications for India's energy security, maritime trade, and strategic interests.

Key Points

Iran's Strategy

- Uses asymmetric warfare through:
 - Proxy groups (Axis of Resistance)
 - Missile and drone capabilities
 - Maritime coercion in the Strait of Hormuz.
- Seeks strategic leverage against Western sanctions and military pressure.

Axis of Resistance

- Hezbollah (Lebanon)
- Hamas (Palestine)
- Houthis (Yemen)

Importance of the Strait of Hormuz

- Connects the Persian Gulf with the Gulf of Oman and Arabian Sea.
- World's most important oil transit chokepoint.
- Around 20% of global petroleum liquids consumption passes through the Strait (U.S. Energy Information Administration).

Implications for India

- India imports a major share of its crude oil from Gulf countries.
- Disruption may lead to:
 - Higher crude oil prices.
 - Increased freight and insurance costs.
 - Inflationary pressures.
 - Widening Current Account Deficit (CAD).

Tehran needs to recognise the limits of its current geopolitical advantage

Fullfil the promise

New Delhi cannot keep stalling the restoration of Statehood to J&K

It has been over two and a half years since the Supreme Court of India recorded the Union government's solemn assurance that Statehood would be restored to Jammu and Kashmir (J&K). It set no timeline, but the expectation was that it would happen within a reasonable period and steps would be taken progressively. That the Bharatiya Janata Party (BJP)-led government has done nothing on this front since then can only mean that it has interpreted the lack of a timeline as a licence for the indefinite deferral of Statehood. This is despite repeated assurances from the Centre. Prime Minister Narendra Modi pledged it in the run-up to the J&K elections, and Home Minister Amit Shah reiterated it on the floor of Parliament. Unsurprisingly, the inaction has driven J&K Chief Minister Omar Abdullah to organise a series of agitations and rallies, culminating in a sit-in at Jantar Mantar on July 20. His grievance, and that of the province, is legitimate. The retention of Union Territory status even after popular elections subordinates the elected government to an unelected Lieutenant Governor who retains preponderant authority over the bureaucracy, the police and other institutions. There is no principled justification for perpetuating this arrangement once elections have been held and a government installed.

New Delhi's rationale for inaction has been trite: "security", invoked by the Solicitor-General before the Court late last year, citing the Pahalgam attack, in a hearing on a petition seeking restoration of Statehood. But this argument cuts no ice. By the government's account, the attack was orchestrated from across the border, and India responded with Operation Sindoor. A cross-border provocation can have no logical bearing on whether J&K's elected representatives are to be trusted with the powers of a full State. If anything, empowering elected leaders to address local grievances is precisely how a polity assuages concerns before they turn into resentment, which fed into cycles of militancy in the Kashmir Valley for decades. The Centre's handling of J&K, Ladakh and even Manipur reveals a troubling pattern in how border regions with substantial minority populations are treated. Secure in its dominance across the north, the west and now the east, the BJP appears to regard the concerns of citizens in these provinces as expendable. Such a view is myopic: governance that treats a border region as politically dispensable only deepens alienation, and instability soon spills over and unsettles governance overall. The BJP seems cynically content to leave the Statehood question hanging until the political arithmetic, already sought to be reworked through delimitation in J&K, tilts decisively in its favour. A promise made to the Court, to Parliament and to the people of J&K cannot be held in abeyance until political circumstances turn expedient for the BJP.

KEY HIGHLIGHTS:

Context

- The Supreme Court (2023), while upholding the Jammu & Kashmir Reorganisation Act, 2019, recorded the Union Government's assurance that Statehood would be restored to Jammu & Kashmir (J&K) at the earliest.
- Although Assembly elections have been conducted and an elected government is in place, Statehood has not yet been restored.
- The issue has again gained attention due to renewed political demands for restoration of full Statehood.

Key Points

- Jammu & Kashmir Reorganisation Act, 2019 Abrogation of the special status under Article 370.
- Reorganisation of the erstwhile State into:
 - Union Territory of Jammu & Kashmir (with Legislature)
 - Union Territory of Ladakh (without Legislature)
- The Lieutenant Governor (LG) exercises significant executive authority over:
 - Public Order
 - Police
 - All India Services and key administrative matters.

- The Supreme Court (In Re: Article 370, 2023):
 - Upheld the constitutional validity of the abrogation of Article 370.
 - Directed the Election Commission of India to complete Assembly elections by 30 September 2024 (subsequently held).
 - Recorded the Union Government's commitment to restore Statehood to J&K.
- Restoration of Statehood remains a policy decision of the Union Government.

Static Linkages

- Article 1 – India as a Union of States.
- Articles 2 & 3 – Parliament's power to create new States and alter areas, boundaries and names of States.
- Article 239 – Administration of Union Territories.
- Article 239A & 239AA – Special provisions for certain Union Territories with legislatures.
- Article 356 – President's Rule.
- Seventh Schedule – Distribution of legislative powers.
- Basic Structure Doctrine – Federalism and Democracy.
- S.R. Bommai v. Union of India (1994) – Federalism is part of the Basic Structure.
- Jammu & Kashmir Reorganisation Act, 2019.

Prelims Facts

- J&K is a Union Territory with Legislature.
- Ladakh is a Union Territory without Legislature.
- Parliament may alter State boundaries under Article 3 after seeking the views of the concerned State Legislature (views are not binding).
- Union Territories derive powers primarily from Articles 239–241.

Mains Value Addition

Significance of Statehood Restoration

- Strengthens representative democracy.
- Reinforces cooperative federalism.
- Enhances accountability of the executive to the elected legislature.
- Improves participatory governance and local decision-making.

Concerns

- Delay in restoration may weaken democratic legitimacy.
- Limited autonomy of the elected government under UT status.
- Balancing national security with democratic governance remains a policy challenge.

Way Forward

- Restore Statehood in accordance with the Union Government's assurance before the Supreme Court.
- Strengthen democratic institutions and cooperative federalism.
- Continue robust security measures while expanding democratic participation.
- Ensure constitutional governance with greater administrative accountability.

Export gains

India's trade weaknesses are becoming episodic, its strengths structural

India's trade data for June offers insights into how the country is weathering the West Asia crisis and the prospect of a deficient monsoon. The fact that the trade deficit jumped 430% in June would seem alarming. However, a deeper look at the composition of this deficit should ease a lot of that alarm. The bulk of the increase in the deficit was due to the sharp increase in merchandise imports in June. And within this, it was led by crude, gold, fertilizers and electronic goods. The value of crude oil imports rose 40% in June 2026, reflecting the skyrocketing prices of oil a few months earlier. Gold prices have also been rising as uncertainty over the West Asia situation persists. The doubling of gold import duties in May would also have pushed up prices in June. With India's natural gas supplies hit due to the West Asia constraints, it has had to import more fertilizer – 201% more by value over last June. The only one of these categories that has seen imports rise sharply due to domestic factors is the electronic goods segment. As India's electronics manufacturing and assembly grow, more parts are going to come from abroad to fuel this engine. The government is encouraging this, as seen in its decision last week to remove the basic customs duty on imported parts in the manufacture of display assemblies, lithium-ion cells and inductor coil modules. These are essential if India wants to boost its manufacturing of high-end electronics such as smartphones, laptops and smart TVs. Going ahead, the attempt should also be to manufacture as many of these inputs locally so that these supply chains can be made truly secure.

The good news is that India's merchandise exports have put on a strong showing, not only in June 2026, but throughout the first quarter of 2026-27. Merchandise exports grew 15.5% in June and by an even quicker 16% in Q1. This was not simply a buoyancy granted by costly petroleum exports, either. Non-petroleum exports grew by a robust 16.5% in June and 12.4% in Q1. This is almost precisely the duration of the West Asia crisis. The data show that India's exports to every region of the world except West Asia grew in Q1, and that a large portion of export growth was in volume terms as well as in value. Indian exporters are to be commended for diversifying so quickly. Service exports, however, grew only 2.9% in June and 6.2% in Q1. As Chief Economic Adviser V. Anantha Nageswaran has warned, success in areas such as Global Capability Centres should not be considered an end in itself – there is still far to go, and complacency will rob India of its advantage in this area.

KEY HIGHLIGHTS:

Context

- India's merchandise trade deficit widened by 430% in June 2026, mainly due to a surge in imports rather than weak exports.
- The increase was driven by higher imports of crude oil, gold, fertilizers and electronic goods amid the West Asia crisis.
- Despite geopolitical tensions, India's merchandise exports remained robust, indicating improved export diversification and resilience.

Why Did Imports Rise?

- Crude Oil: Import value increased by 40% due to elevated global oil prices caused by the West Asia conflict.
- Gold: Imports became costlier due to rising global prices and higher import duty.
- Fertilizers: Import value increased by 201% because disruptions in natural gas supplies from West Asia affected fertilizer availability.
- Electronic Goods: Higher imports of components supported India's expanding electronics manufacturing sector.

Export Performance

- Merchandise exports: +15.5% (June 2026); +16% (Q1 FY2026-27).

- Non-petroleum exports: +16.5% (June); +12.4% (Q1), indicating broad-based export growth.
- Exports increased to almost all regions except West Asia, reflecting market diversification.
- Growth occurred in both volume and value, indicating genuine demand growth.
- Service exports grew relatively slowly:
 - 2.9% (June)
 - 6.2% (Q1 FY2026-27)

Government Measures

- Removal of Basic Customs Duty (BCD) on:
 - Display assembly parts
 - Lithium-ion battery cells
 - Inductor coil modules
- Objective:
 - Promote electronics manufacturing.
 - Integrate India into Global Value Chains (GVCs).
 - Support Make in India and exports.

Static Concepts

- Balance of Trade (BoT): Difference between merchandise exports and merchandise imports.
- Current Account includes:
 - Merchandise trade
 - Services trade
 - Remittances
 - Investment income
- A trade deficit does not necessarily imply a current account deficit, as services and remittances may offset it.
- India imports nearly 85% of its crude oil requirement, making energy security a key economic concern.
- Natural gas is a major feedstock for urea production; disruptions increase fertilizer imports.
- Participation in Global Value Chains (GVCs) initially increases imports of intermediate goods before raising exports.

Importance

Economic Significance

- Indicates resilience of India's external sector despite global geopolitical shocks.
- Reflects diversification of export destinations.
- Highlights India's increasing integration with global manufacturing supply chains.

Concerns

- High dependence on imported crude oil.
- Fertilizer import dependence affects food security.
- Electronics sector still relies heavily on imported components.
- Slow growth in service exports.
- Persistent trade deficits may increase external sector vulnerability.

Way Forward

- Increase domestic production of electronic components and semiconductor ecosystem.
- Diversify crude oil and fertilizer import sources.
- Strengthen renewable energy and green hydrogen to reduce energy imports.
- Promote high-value manufacturing under Make in India and PLI Scheme.
- Expand export markets through FTAs and improved logistics.
- Increase domestic value addition in electronics to reduce import dependence.

America's hubris has yielded a dramatically more dangerous world

THE RESUMPTION of the Iran war, with a dramatic escalation of the military operations, has laid bare the realities of modern warfare. In hindsight, perhaps the US was itching to show the world that the MoU that inaugurated the truce was not the strategic disaster it was widely perceived to be. After all, the invading coalition launched "Topic Parv", premised on overwhelming force and decisive transformation, but the military campaign was regarded as an Epic Failure – a textbook example of how muddled objectives, fundamental misreading of adversaries, and alienation of international partners caused the offensive to boomarang on its orchestration.

Rather than executing the regime change that was rashly announced as the principal objective, the war paradoxically targeted the targeted nation, expanded its geopolitical prestige, and left the international coalition pursuing the conflict on significantly worse terms than when it began. The volatile 60-day negotiation framework that officially commenced on June 15, when US Vice President JD Vance and Iranian Speaker Mohammad Bagher Ghalibaf signed a 14-point MoU, has collapsed, though peace talks are being attempted in Oman. Still, the war underscored the severe limitations of coercive military power in an era where asymmetric capabilities can disrupt global superpower superiority.

The primary warning is that the shattered coalition's military calculus was the sudden and highly effective closure of the Strait of Hormuz. For all the technological prowess brought to bear by Western forces, naval and military planners quickly discovered that in an era dominated by low-cost drone warfare, re-establishing total control over a critical maritime chokepoint is a challenging endeavour once an adversary has



SHASHI THAROOR

aid mines offshore and prepared its defenses. By leveraging a simple yet far-reaching deterrent, the defending nation successfully held the global economy hostage, forcing a desperate rush toward diplomacy. The resulting MoU, in exchange for merely returning to the status quo ante and allowing shipping lanes to reopen temporarily, granted sweeping concessions, including massive phased sanctions relief, Iranian export of over 40 million barrels of oil, the unfreezing of over \$100 billion in foreign assets, and the establishment of a historic multinational reconstruction fund, while details of the nuclear deal remain unclear. All this could have been achieved at the negotiating table without resort to war and without disrupting the world economy.

A core demand of the invasion, the eradication of Iran's ballistic-missile capacity, was omitted from the MoU, leaving the invaders to crow about reopening a waterway that was not even closed before their war began. US missiles remain "locked and loaded" for ballistic missile attacks against US bases in Bahrain, Kuwait, Qatar and Jordan.

The strategic failure has also exposed the fallacy of leadership decapitation. While initial strikes successfully targeted and eliminated high-ranking political and military figures, the entrenched institutional structure of the Iranian state proved remarkably resilient. Rather than inducing moderation or domestic collapse, the systematic assassination of the ruling elite simply cleared the path for a new younger generation of leaders who are demonstrably more radical, fiercely angry, more sophisticated, and committed to regional dominance.

The economic ripple effects of this miscalculation extend far beyond the immediate combat zones, inflicting a ruinous toll on

the Global South, Iran estimates that the conflict has set back its economy by roughly \$200 billion, but energy-dependent nations like India have been hit almost as severely. As the conflict chokes off regional trade, skyrocketing oil prices and rampant inflation severely strained fiscal balances, driving up import costs and weakening the rupee, compromising the economic security of millions who had nothing to do with the war.

The international community's endorsement of an integrated ceasefire across multiple fronts (and the MoU's failure to end regional proxy funding) had effectively formalised Iran's right to intervene politically and militarily in neighbouring states to protect proxies like Hezbollah, Hamas, and the Houthis. This is another reality the muted actors seek to undo.

Washington realises the conflict has severely diminished the geopolitical authority and credibility of the superpower that initiated it. Hence Trump's threat that 1,000 US missiles remain "locked and loaded" for immediate unleashing. Domestically, the architects of the war face intense public backlash for failing to deliver on promises of rapid peacemaking and minimal inflation, while internationally global actors increasingly view the US not as a stable anchor but as an unpredictable risk to the global equilibrium.

The disastrous current situation serves as a stark historical warning that military hubris, when detached from coherent objectives and historical reality, inevitably yields a fractured international order, severely compromised allies, and a dangerously more dangerous world.

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- Increase Current Account Deficit (CAD).
- Fuel imported inflation.
- Increase fiscal burden due to higher energy costs.
- Put pressure on the Indian Rupee.
- Safety of Indian diaspora and shipping in West Asia remains a strategic concern.

Global Implications

- Threat to global energy security.
- Increased shipping and insurance costs.
- Supply-chain disruptions.
- Risk of wider regional conflict involving proxy actors.
- Greater uncertainty in international trade.

Static Linkages

- UNCLOS, 1982 Provides Transit Passage through international straits used for international navigation.
- Strategic Chokepoints Strait of Hormuz
- Bab-el-Mandeb
- Strait of Malacca
- Suez Canal
- Panama Canal
- Asymmetric Warfare Use of low-cost military capabilities by weaker states to offset conventional military superiority.
- India's Energy Security Strategic Petroleum Reserves (SPR)
- Diversification of crude import sources
- Renewable Energy Mission
- Green Hydrogen Mission

Critical Analysis

Significance

- Highlights strategic importance of maritime chokepoints.
- Demonstrates changing character of warfare.
- Reinforces importance of energy diversification.
- Underlines need for diplomatic conflict resolution.

Challenges

- Escalation threatens global peace.
- Oil price volatility impacts developing economies.
- Increased militarisation of international waterways.
- Weakening of multilateral diplomacy.
- Greater nuclear proliferation risks.
- Economic burden on energy-importing countries like India.

Way Forward

- Promote diplomatic resolution through multilateral platforms.
- Ensure freedom of navigation under UNCLOS.
- Strengthen maritime security cooperation.
- Diversify India's crude oil import sources.
- Expand Strategic Petroleum Reserves.
- Accelerate renewable energy and Green Hydrogen Mission.
- Strengthen regional dialogue in West Asia.

KEY HIGHLIGHTS:

Context

- The U.S. and Iran resumed military operations after the collapse of a temporary ceasefire framework.
- The conflict has renewed concerns over the Strait of Hormuz, a critical global maritime chokepoint.
- Escalation has raised issues relating to energy security, maritime security, freedom of navigation, regional stability, and global economic growth.
- The developments are important for India, given its dependence on energy imports from West Asia.

Key Points

Strait of Hormuz

- Lies between Iran (north) and Oman & UAE (south).
- Connects the Persian Gulf with the Gulf of Oman and Arabian Sea.
- One of the world's most important oil and LNG transit chokepoints.
- Any disruption directly affects global crude oil prices and supply chains.

Nature of Modern Warfare

- Increasing role of:
 - Armed drones
 - Precision-guided missiles
 - Naval mines
 - Cyber warfare
 - Electronic warfare
 - Proxy groups
- Demonstrates the effectiveness of asymmetric warfare against technologically superior militaries.

Implications for India

- Around 85% of India's crude oil requirement is imported.
- Higher crude prices may:

Australian uranium fuels next phase in India's n-programme



MANPREET
SETHI



BHAWNA
BUDHWAR

COMMON SECURITY concerns have made Australia and India discover a new relevance for their relationship. This was reflected in the forward-looking joint statement that came out of the two countries' recent summit. It lists many areas of cooperation, but what stands out is movement on uranium supplies from Australia to India's nuclear power programme.

Historically, Australia has maintained a strict policy of exporting uranium only to signatories of the Treaty on the Non-Proliferation of Nuclear Weapons (NPT). Canberra had frowned when India, a non-NPT member, concluded the nuclear cooperation agreement with the USA in 2008 and subsequently was exceptionalised by the Nuclear Suppliers Group to source uranium, nuclear equipment, technology and reactors from the international market. Australia's change of heart is good news. It holds the world's largest uranium reserves, approximately one-third of the global total. And the quality of Australian uranium far outstrips India's low-grade mineral, which exacts higher extraction costs and generates significant tailings that need to be safely managed to protect human health and the environment.

India's consistent non-proliferation credentials facilitated the shift in the Australian position. This began once India signed an Additional Protocol (AP) with the International Atomic Energy Agency (IAEA) in 2009, committing itself to a "separation plan" that bifurcated its nuclear facilities into civilian and military. India safeguarded its strategic autonomy while meeting the non-proliferation requirements of international civilian nuclear cooperation. Once the AP came into force in 2014, an Australia-India Nuclear Cooperation Agreement was concluded in 2015 to enable uranium exports.

However, commercial uranium exports did not start immediately because an Administrative Arrangement (AA) to implement the agreement had to be operationalised in Australia. This had to establish the practical procedures for tracking, accounting and reporting the use of Australian Obligated Nuclear Material (AONM), ensuring that the imported uranium would be used exclusively for peaceful civilian purposes in

accordance with the bilateral agreement and IAEA safeguards. Consensus on the safeguards-related procedures governing the tracking of uranium was achieved after two years of intensive negotiations. This signals renewed hope that Australian uranium will make its way to India once commercial contracts are in place. Since 2008-09, India has been importing natural uranium ore concentrate from Canada, France, Kazakhstan and Uzbekistan and natural uranium dioxide pellets and enriched uranium from Russia. With the availability of Australian uranium, the kitty would further expand.

These developments are the building blocks for India's nuclear energy expansion, which aims to increase installed nuclear power capacity from 8.78 GW to 100 GW by 2047. To achieve this, the government has a two-pronged approach. One, a "fleet mode" expansion of large reactors led by India's nuclear operator, the Nuclear Power Corporation of India Ltd (NPCIL). By itself and in partnership with NTPC, NPCIL is engaged in the construction of several 700 MWe indigenous nuclear reactors, with more to follow. Two, the government is supporting the research and development of low-carbon small modular reactors for energy-guzzlers such as steel/cement plants or AI data centres. The necessary legislative and regulatory changes have been effected through the SHANTI Act. The government will continue to control strategic and security-sensitive segments of the nuclear fuel cycle.

Keeping in view the planned large-scale expansion of all reactor sizes, India is pursuing a strategy to build a strategic uranium reserve to guard against supply-chain disruptions that may be caused by black swan events like pandemics or the eruption of geopolitical hotspots. A new enthusiasm has gripped the nuclear power sector. While the government assures access to nuclear fuel, the nascent private industry must imbibethe highest standards of safety, security and safeguards. NPCIL will have to do the hand-holding to enable India to write a new chapter of its nuclear story.

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Consensus on the safeguards-related procedures governing the tracking of uranium was achieved after two years of intensive negotiations. This signals renewed hope that Australian uranium will make its way to India once commercial contracts are in place

KEY HIGHLIGHTS:

Context

- India and Australia strengthened civil nuclear cooperation during their recent bilateral summit.
- The joint statement indicated progress towards commercial supply of Australian uranium to India.
- The development supports India's target of expanding installed nuclear power capacity from 8.78 GW to 100 GW by 2047.

Key Points

- Australia possesses about one-third of the world's known recoverable uranium reserves.
- Australia traditionally exported uranium only to NPT signatories.
- India is not a signatory to the NPT, but received the Nuclear Suppliers Group (NSG) waiver (2008), enabling global civil nuclear trade.
- India signed the IAEA Additional Protocol (2009) under its civilian-military nuclear separation plan.
- The India-Australia Civil Nuclear Cooperation Agreement came into force in 2015.
- An Administrative Arrangement (AA) was concluded to:
 - Track Australian Obligated Nuclear Material (AONM).
 - Ensure uranium is used only for peaceful civilian purposes.
 - Comply with IAEA safeguards.
- India currently imports uranium from:

- Canada, Kazakhstan, Uzbekistan, Russia, France
- Australia's entry will diversify India's uranium imports and strengthen energy security.
- India plans:
 - Fleet-mode construction of indigenous 700 MWe PHWRs.
 - Development of Small Modular Reactors (SMRs).
 - Creation of a strategic uranium reserve.

Static Linkages

- Three-Stage Nuclear Power Programme (Dr. Homi J. Bhabha):
 - Stage I – Pressurised Heavy Water Reactors (PHWRs)
 - Stage II – Fast Breeder Reactors (FBRs)
 - Stage III – Thorium-based reactors (U-233 cycle)
- India is not a member of the NPT due to its discriminatory structure.
- IAEA safeguards ensure peaceful use of civilian nuclear material.
- NSG is an export-control regime regulating global nuclear commerce.
- Nuclear energy is a low-carbon baseload energy source essential for India's Net Zero 2070 commitment.
- India is a member of:
 - IAEA, MTCR, Wassenaar Arrangement, Australia Group, (Not a member of NSG).

Critical Analysis

Significance

- Ensures long-term fuel security for India's expanding nuclear programme.
- Diversifies uranium imports, reducing supply risks.
- Strengthens India-Australia Comprehensive Strategic Partnership.
- Supports India's clean energy transition and decarbonisation goals.
- Facilitates future deployment of SMRs and advanced reactors.

Challenges

- High capital cost and long gestation period of nuclear projects.
- Dependence on imported uranium despite domestic reserves.
- Radioactive waste management and nuclear safety concerns.
- Delays in reactor construction and regulatory approvals.
- Need for robust safety, security and safeguards.

Way Forward

- Build a strategic uranium reserve.
- Accelerate indigenous reactor construction under fleet mode.
- Expand international civil nuclear partnerships.
- Promote domestic uranium exploration.
- Strengthen nuclear safety and regulatory oversight.
- Invest in SMRs and advanced nuclear technologies.
- Enhance public awareness regarding nuclear safety.

Government must talk to Sonam, that's its duty

AS SONAM Wangchuk's hunger strike at the capital's Jantar Mantar enters yet another day, the government holds on to its hard silence. Wangchuk is no stranger to the political establishment he seeks to address, again. Last year, the profusely awarded innovator, education reformer and climate activist was arrested after a section of the protests he led in Leh — demanding statehood and Sixth Schedule safeguards for Ladakh — turned violent. The man celebrated for breaking the mould was accused of instigating the violence, labelled "anti-national", slapped with the stringent NSA. In March this year, after about 170 days in jail, Wangchuk walked free after the government revoked his preventive detention, only days before it was to come up in court. It was actively engaging in a dialogue to address the people's aspirations and concerns in Ladakh, the government said, through a high-powered committee and other platforms. Today, Wangchuk's demand has changed — along with the Cockroach Janta Party, he is demanding accountability and educational reform in the wake of the NEET paper leak. But the government's instinct and playbook remain the same — it has set its face against the protesters. As of now, it is not clear whether or when it will take the next step and relent and engage.

The BJP-led government needs to reflect on its own response pattern. The Wangchuk-CJP protest cannot be compared to other instances, it is very much a product of its moment. But be it the farmers' agitation against the farm laws being pushed through without consultation, or demonstrations against a citizenship law more discriminatory — civil society protests have almost always shone a light on the government's inability to reach out. It cannot find the words and language to talk to those who disagree with it. This reinforces the impression that it is uncomfortable with anything that involves give and take. It is only at home talking to others, it seems, when it is striking deals with them in the political backrooms to add to its growing numbers in Parliament. Talking and listening, dialogue and negotiation, is a government's bounden duty in a democracy — not an instrument it uses only to swing a transaction. The government needs to talk to Wangchuk and his supporters at Jantar Mantar.

Whether it does so or not, Wangchuk has made his point. The NEET leak did not just affect those who took the exam, it has drawn attention to a broken educational system, and the need to set it right. Those changes will take patience — and more men and women like Wangchuk, dedicated to a cause that resonates wide and deep in a country of the young. That's why he must end the fast and why the government must find a way to talk to him.

KEY HIGHLIGHTS:

Context

- Education reformer and climate activist Sonam Wangchuk is on a hunger strike demanding:
 - Accountability in the NEET paper leak.
 - Comprehensive reforms in India's examination system.
- Earlier, Wangchuk had led protests seeking:
 - Statehood for Ladakh.
 - Sixth Schedule status for Ladakh to safeguard tribal interests.
- The issue has brought focus on democratic dissent, constitutional rights, governance, and examination reforms.

Key Points

- NEET paper leak exposed vulnerabilities in India's competitive examination system.
- Raises concerns regarding:
 - Credibility of public examinations.
 - Institutional accountability.
 - Transparency in recruitment and admissions.
- Highlights the importance of:
 - Citizens' right to peaceful protest.
 - Government-civil society dialogue.
- Relevant institutions:
 - National Testing Agency (NTA)
 - Ministry of Education
 - Central investigative agencies.

Static Linkages

- Article 19(1)(a): Freedom of Speech and Expression.
- Article 19(1)(b): Right to assemble peacefully without arms.
- Article 19(2) & 19(3): Reasonable restrictions.
- Article 14: Equality before Law.
- Article 21: Right to Life and Personal Liberty.
- Article 22: Constitutional provisions relating to preventive detention.
- Sixth Schedule: Autonomous administration for tribal areas of Assam, Meghalaya, Tripura and Mizoram.
- Ladakh is a Union Territory and is not covered under the Sixth Schedule.

Critical Analysis

Significance

- Reinforces democratic participation through peaceful protest.
- Emphasizes accountability of public institutions.
- Highlights need for credible examination mechanisms.
- Strengthens constitutional values of transparency and rule of law.

Challenges

- Balancing Right to Protest with public order.
- Restoring trust in competitive examinations.
- Delays in grievance redressal.
- Weak coordination among examination authorities.

Way Forward

- Strengthen examination security using advanced technology.
- Establish independent examination oversight mechanisms.
- Ensure time-bound investigation of paper leaks.
- Enhance transparency in NTA functioning.
- Promote institutional dialogue between government and stakeholders.
- Strengthen grievance redressal and accountability mechanisms.