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# West Asia Crisis: The Strait of Hormuz and India's Energy Tightrope

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**WHY IN NEWS**

The US launched "Operation Epic Fury" and Israel simultaneously launched "Operation Lion's Roar" against Iran in early March 2026, following the reported killing of Iran's Supreme Leader. Iran retaliated with "Operation True Promise 4," escalating fears of a Strait of Hormuz disruption that directly threatens India's energy imports and the safety of 9 million Indians in the Gulf region.

A new military confrontation involving the United States, Israel, and Iran has erupted in West Asia — and for India, the consequences extend well beyond the battlefield. The crisis is simultaneously a geopolitical test of strategic autonomy, an energy security emergency, a diaspora safety challenge, and a stress test for India's carefully cultivated diplomatic relationships across the region.

## HOW IT UNFOLDED

The latest cycle of escalation was triggered by the reported killing of Iran's Supreme Leader Ali Khamenei — the most significant leadership decapitation in Iranian history. Within hours, the US launched **"Operation Epic Fury"** and Israel followed with **"Operation Lion's Roar"**, targeting Iranian military and nuclear infrastructure. Iran responded with a massive retaliatory strike it named **"Operation True Promise 4"** — a continuation of the nomenclature it used during earlier exchanges with Israel in 2024 — involving ballistic missiles and drone swarms directed at US bases in the region and Israeli territory.

The conflict has rapidly drawn in regional actors. Saudi Arabia and the UAE have urged de-escalation while quietly preparing for economic disruption. Turkey has called for an emergency UN Security Council session. Russia and China have condemned the strikes on Iran. UN Secretary-General António Guterres has warned of risks to global food and energy systems.

## THE STRAIT OF HORMUZ: A 33-KILOMETRE CHOKEPOINT FOR THE WORLD

The Strait of Hormuz — a narrow waterway between Iran and Oman at the mouth of the Persian Gulf — is arguably the single most consequential maritime passage on Earth. Its blockage or disruption would send shockwaves through every major economy within days.

**Key Facts:**

| Metric | Figure |
|---|---|
| Width at narrowest point | ~33 km (navigable shipping lane: ~3 km each way) |
| Daily crude oil transit | ~20 million barrels (roughly 20% of global traded oil) |
| LNG transit | ~30% of global liquefied natural gas |
| Countries dependent on it | Saudi Arabia, UAE, Iraq, Kuwait, Bahrain, Qatar |

Iran has repeatedly threatened to close the Strait during periods of maximum pressure — most notably in **January 2012**, when tensions spiked over Western sanctions and Iran's nuclear programme, and again in **July 2019**, when the US reimposed "maximum pressure" sanctions after withdrawing from the Joint Comprehensive Plan of Action (JCPOA) in May 2018. In both instances, the threat triggered oil price spikes and put global shipping on alert. While a full closure is militarily and economically self-destructive for Iran (whose own oil exports pass through it), even a partial disruption — through mine-laying, harassment of tankers, or drone strikes on shipping — would be enough to spike global oil prices dramatically.

### *INDIA'S SPECIFIC VULNERABILITIES*

India's exposure to this crisis is structural, not incidental.

**Energy Dependence:** India imports **85–88% of its crude oil** requirements — one of the highest import dependency ratios among major economies. India's total crude oil import bill in 2023-24 stood at approximately **$130 billion**, underscoring the enormous fiscal exposure to any price shock. Of this:

- **2.5 to 2.7 million barrels per day** pass through the Strait of Hormuz bound for Indian ports
- India's top oil suppliers — Saudi Arabia, UAE, Iraq — are all Persian Gulf states whose exports route through the Strait
- A 10% supply disruption could push domestic petrol prices up by ₹8–12 per litre at current global benchmarks
- India's **Strategic Petroleum Reserves (SPR)** are managed by **ISPRL (Indian Strategic Petroleum Reserves Limited)**, a Special Purpose Vehicle under the Ministry of Petroleum and Natural Gas. Phase 1 capacity is **5.33 million metric tonnes (MMT)** stored at three underground rock cavern facilities: Vishakhapatnam (Andhra Pradesh, 1.33 MMT), Mangaluru (Karnataka, 1.5 MMT), and Padur (Karnataka, 2.5 MMT) — equivalent to roughly **9.5 days** of India's consumption. This is sufficient to buffer a short disruption but not a prolonged blockade.

**The Chabahar Equation:** India has invested significantly in Iran's **Chabahar Port** as its gateway to Afghanistan and Central Asia, bypassing Pakistan. On **May 13, 2024**, India signed a **10-year lease agreement** with Iran for operating the Shahid Beheshti terminal at Chabahar (auto-renewable for another 10 years). IPGL will invest approximately **$120 million** in equipping the port, with an additional **$250 million credit window** in Indian rupees for Chabahar-related infrastructure. The port is operated by **Indian Ports Global Limited (IPGL)**, a public sector undertaking under India's Ministry of Ports, Shipping and

Waterways. Chabahar handles transit cargo and gives India strategic access to the **International North-South Transport Corridor (INSTC)**. A prolonged military conflict in Iran disrupts this corridor entirely, weakening India's connectivity ambitions in the region and potentially placing Indian personnel operating at the port in harm's way.

**IMEC at Risk:** The **India-Middle East-Europe Economic Corridor (IMEC)** — announced at the **G20 New Delhi Summit on September 9-10, 2023** — is a multi-modal connectivity initiative with the MoU signed by **India, the United States, Saudi Arabia, the UAE, the European Union, Italy, France, and Germany**. The corridor routes through UAE, Saudi Arabia, Jordan, and Israel before connecting to Europe via Mediterranean ports. The current conflict threatens the Israeli and broader West Asian nodes of this corridor, potentially delaying what was projected as a generational trade and infrastructure initiative.

**The Diaspora:** Approximately **9 million Indians** live and work across Gulf Cooperation Council (GCC) states — the largest Indian diaspora concentration in the world. They remit over **$40 billion annually** to India, making GCC remittances the single largest source of inward remittances. A military conflict that destabilises the region puts both lives and livelihoods at risk.

India has conducted large-scale civilian evacuations before. **Operation Rahat (2015)** — conducted to evacuate Indians from Yemen during the civil war — deployed Indian Air Force (IAF) C-17 Globemaster III transport aircraft and Indian Navy warships including **INS Mumbai** and **INS Sumitra**, evacuating approximately **4,640 Indians** and an additional **960 foreign nationals from 41 countries**, demonstrating India's capacity for complex multi-modal evacuations.

| Operation | Year | From | Evacuated |
|---|---|---|---|
| Operation Rahat | 2015 | Yemen | ~4,640 Indians + 960 foreigners (from 41 countries) |
| Operation Ganga | 2022 | Ukraine | ~22,500 Indians |
| Operation Ajay | 2023 | Israel | ~1,400+ Indians |
| Operation Kaveri | 2023 | Sudan | ~3,800+ Indians |

The scale of potential evacuation from nine GCC nations simultaneously would be unprecedented.

### *INDIA'S DIPLOMATIC TIGHTROPE*

India's West Asia policy rests on what foreign policy scholars call *"omni-directional engagement"* — building and maintaining relationships with every major power in the region simultaneously, regardless of their contradictions with each other. India has:

- Deep strategic, economic, and defence ties with **Israel** (India is Israel's largest arms market)
- Energy-dependent relationships with **Saudi Arabia, UAE, and Iraq**
- Significant trade, investment, and Chabahar partnerships with **Iran** (even while navigating US sanctions)

- Strong bilateral ties with **the United States** through the Quad framework and defence cooperation

In this conflict, India cannot afford to take sides. Its likely posture: formal calls for de-escalation and diplomacy through multilateral forums (UN, G20), quiet preparation of evacuation logistics, activation of its petroleum reserve protocols, and working the back-channels with all parties — particularly maintaining communication with Tehran to protect Chabahar operations.

**India must balance:**

- Its stated commitment to sovereignty and non-interventionism
- Its energy security imperatives
- **CAATSA (Countering America's Adversaries Through Sanctions Act)** — signed into US law in **August 2017** — compliance pressures around Iranian oil purchases; **Section 231** of CAATSA specifically targets entities that engage in significant transactions with Russia's defence or intelligence sectors, with analogous pressure mechanisms for Iran
- The humanitarian responsibility toward 9 million nationals abroad

## *BROADER GEOPOLITICAL IMPLICATIONS*

The conflict is reshaping the global order in real time. For UPSC Mains, the following angles are analytically rich:

- **US domestic politics:** Any major military engagement shifts the American political discourse; India must factor in electoral cycles in US foreign policy
- **Oil market response:** OPEC+ (led by Saudi Arabia and Russia) will face pressure to increase supply; but if Saudi fields are threatened, even OPEC+ capacity may be compromised
- **China's opportunity:** Beijing is both Iran's largest oil customer and a significant economic partner for Gulf states; the conflict gives China scope to expand its regional influence precisely as the US is militarily entangled
- **UN Security Council paralysis:** With Russia and China vetoing any US-backed resolution, the UNSC remains gridlocked — reinforcing the argument for reformed multilateralism

## UPSC RELEVANCE

Strait of Hormuz — location, width, daily oil volume; India's crude import dependence; SPR locations and capacity; names of evacuation operations; IMEC route.

**MAINS GS-2:**

India's West Asia policy, strategic autonomy, diaspora management; GCC remittances; Chabahar Port significance.

**GS-3:**

Energy security, import dependency, strategic petroleum reserves, supply chain disruptions.

**ESSAY:**

"India's foreign policy walks a tightrope between values and interests."

## 📌 FACTS CORNER — KNOWLEDGEPEDIA

**Strait of Hormuz width:** ~33 km; navigable shipping lane ~3 km each direction

**Daily crude oil transit (Hormuz):** ~20 million barrels (~20% of global traded oil)

**LNG transit:** ~30% of global LNG passes through the Strait

**India's crude import dependence:** 85–88%

**India's crude import bill (2023-24):** ~$130 billion

**India's daily crude via Hormuz:** 2.5–2.7 million barrels/day

**SPR managed by:** ISPRL (Indian Strategic Petroleum Reserves Limited)

**SPR Phase 1 capacity:** 5.33 MMT (million metric tonnes) — ~9.5 days of India's consumption

**SPR locations:** Vishakhapatnam (1.33 MMT, Andhra Pradesh), Mangaluru (1.5 MMT, Karnataka) & Padur (2.5 MMT, Karnataka)

**Indians in GCC states:** ~9 million (90 lakh)

**GCC remittances to India:** ~$40 billion/year — largest source of India's inward remittances

**IMEC full form:** India-Middle East-Europe Economic Corridor

**IMEC announced:** G20 New Delhi Summit, September 9, 2023; MoU signatories: India, USA, Saudi Arabia, UAE, EU, Italy, France, Germany

**Chabahar Port:** Located in Sistan-Baluchestan province, Iran; India's gateway to INSTC

**Chabahar 10-year lease:** Signed May 13, 2024; IPGL investment ~$120M + $250M credit window for infrastructure; auto-renewable for another 10 years; operated by IPGL (Indian Ports Global Limited)

**INSTC full form:** International North-South Transport Corridor

**CAATSA full form:** Countering America's Adversaries Through Sanctions Act; signed into US law August 2017; Section 231 targets Russian defence purchases

**Iran's Hormuz closure threats:** 2012 (sanctions crisis), 2019 (post-JCPOA US withdrawal)

**Operation Rahat (2015, Yemen):** 4,640 Indians + 960 foreigners (from 41 countries) evacuated; IAF C-17s and INS Mumbai/Sumitra deployed

**Operation Ganga (2022, Ukraine):** ~22,500 Indians evacuated

**Operation Ajay (2023, Israel):** 1,400+ Indians evacuated

**Operation Kaveri (2023, Sudan):** 3,800+ Indians evacuated

### OTHER RELEVANT FACTS:

Hormuz is located between **Iran** (north coast) and **Oman/UAE** (south coast)

Gulf states dependent on Hormuz exports: Saudi Arabia, UAE, Iraq, Kuwait, Bahrain, Qatar

India is **Israel's largest arms export market** (bilateral defence trade ~$2.1 billion)

India's top crude oil suppliers: Saudi Arabia, Iraq, UAE, Russia (post-2022 diversification)

"Operation True Promise" is Iran's retaliatory strike series against Israel (began April 2024)

Iran's Fattah missile — claimed hypersonic; speed Mach 13–15

India received a **CAATSA waiver** from the US for purchasing S-400 from Russia

Sources: The Hindu, Indian Express, PIB, Ministry of External Affairs, Livemint

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