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**EDITORIAL ANALYSIS**

# Fire and Fury — The Ill-Conceived War on Iran and Its Global Fallout

THE HINDU

20 March 2026

**SUBJECTS COVERED****IR** **ECONOMY** **SECURITY & DEFENCE****GS PAPERS****GS2** **GS3****CURATED & WRITTEN BY****Bharat Choudhary**

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# Fire and Fury — The Ill-Conceived War on Iran and Its Global Fallout

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GS2

GS3

**TH**

The Hindu

MAINS RELEVANCE:

GS Paper 2

GS Paper 3



## INTERVIEW ANGLE

*"Iran's closure of the Strait of Hormuz has triggered a global energy crisis. How should India navigate this conflict given its dependence on Gulf oil, its ties with Iran (Chabahar), Israel (defence), and the US (strategic partnership)? What does this test about India's 'strategic autonomy'?"*

## WHY IN NEWS

The Iran–US–Israel conflict has escalated into direct military strikes on Iranian nuclear and energy infrastructure, triggering Iran's retaliatory closure of the Strait of Hormuz and attacks on Gulf energy facilities — including Qatar's Ras Laffan LNG complex. The Hindu editorial characterises the war as “ill-conceived and illegal,” warning of catastrophic consequences for global energy markets and regional stability.

## THE ESCALATION TIMELINE — 2026 WEST ASIA CRISIS

The current conflict represents a dramatic escalation of tensions that had been building since the October 7, 2023 Hamas attacks on Israel:

### Key escalation triggers in 2026:

**Israel-Iran direct strikes:** Israel assassinated senior Iranian officials (including Ali Larijani, former Parliament Speaker and key nuclear negotiator) and attacked Iran's **South Pars gas fields** — a major strategic and economic provocation

**US military strikes:** The Trump administration approved strikes on Iranian nuclear facilities, citing intelligence on weapons-grade enrichment progress

**Iran's response:** Closed the **Strait of Hormuz** to international shipping; launched retaliatory missile and drone strikes on energy infrastructure in Qatar (Ras Laffan), UAE (Abu Dhabi LNG terminal), and Saudi Arabia (Ras Tanura)

**Houthi escalation:** Yemen’s Houthi forces (backed by Iran) intensified attacks on Red Sea shipping AND directly struck Gulf energy infrastructure for the first time

**The editorial’s central critique:** The Trump administration contradicted its own 2016 and 2024 campaign rhetoric against “forever wars” — and has led the US into another disastrous military engagement at Israel’s strategic direction.

## THE STRAIT OF HORMUZ — ENERGY GEOGRAPHY

The **Strait of Hormuz** is the world’s single most critical energy chokepoint:

Metric	Data
Width at narrowest	~33 km; navigable lane: 3 km each way
Daily oil flow	~20–21 million barrels (~20% of globally traded oil)
LNG flow	~20% of global LNG trade
Countries dependent	India, Japan, South Korea, China, Western Europe
Iran’s leverage	Controls the northern coast; can mine/blockade the strait

### Iran’s Hormuz threat capability:

**Naval mines:** Iran has a large stockpile of naval mines — the most effective tool for choking traffic without open battle

**Anti-ship missiles:** Noor (C-802 derivative), Khalij Fars ballistic anti-ship missile

**Swarm boats:** Revolutionary Guard Navy (IRGC-N) uses fast attack craft in swarm tactics

**Kish Island / Bandar Abbas:** Iran’s naval bases on the strait provide tactical proximity

**Previous Hormuz crises:** 1984–88 (Tanker War during Iran-Iraq War) — US Navy provided escort convoys (Operation Earnest Will). Even then, 16 tankers were struck and insurance rates spiked 400%.

## INDIA’S STRATEGIC EXPOSURE

### ENERGY DEPENDENCE:

India imports **85–88%** of crude oil (crude import dependence)

~**60%** of crude imports come from West Asia (Saudi Arabia, UAE, Iraq, Kuwait, Qatar)

**LNG from Qatar:** ~50% of India’s LNG imports come through Ras Laffan

India's **Strategic Petroleum Reserve (SPR)**: Only ~9.5 days of consumption buffer (Vizag, Mangaluru, Padur — total 5.33 MMT)

### **DIPLOMATIC BALANCING:**

India maintains relations with all key parties simultaneously:

**Iran:** Chabahar port project (strategic access to Afghanistan + Central Asia, exempted from US sanctions); historic civilisational ties; \$1B+ Indian investment

**Israel:** Second-largest defence equipment supplier to India after Russia; ₹20,000 crore+ in defence contracts; intelligence cooperation

**USA:** India-US strategic partnership (QUAD, iCET, defence technology transfer); FTA negotiations

**Gulf Arab states:** 8 million Indian diaspora; \$40 billion+ annual remittances; bilateral investment treaties

**The editorial's observation:** India's policy of "strategic autonomy" is under its most severe test — as the conflict forces harder binary choices. India did not join **Operation Prosperity Guardian** (US-led Red Sea coalition) and has not condemned Iran's Hormuz closure — maintaining official neutrality while privately scrambling for alternative energy sourcing.

## THE EDITORIAL'S CORE ARGUMENT

The Hindu's editorial makes three interconnected arguments:

### **1. THE WAR IS STRATEGICALLY COUNTERPRODUCTIVE**

The editorial argues that military strikes on Iran's nuclear facilities will **accelerate, not prevent, nuclear proliferation**:

Iran's **nuclear breakout capability** is now measured in weeks; strikes on above-ground enrichment facilities (Natanz, Fordow) do not destroy the knowledge or the will to rebuild

Historical precedent: Israel's 1981 Osirak strike on Iraq's reactor — Saddam accelerated the nuclear programme clandestinely afterwards

The strikes have handed Iranian hardliners a domestic legitimacy boost, weakening reform movements

### **2. TRUMP'S "DEAL-MAKING" FRAMING HAS FAILED**

The editorial notes the fundamental contradiction — Trump simultaneously threatened military action AND offered diplomatic engagement (through back-channels involving Oman), sending incoherent signals. The diplomatic window was closed by the military escalation.

**Comparable Trump-Iran dynamic:** Trump withdrew from JCPOA (Joint Comprehensive Plan of Action) in 2018 (Maximum Pressure Campaign); JCPOA (2015) had been the multilateral framework that capped Iranian enrichment at 3.67% and reduced centrifuge count.

### 3. THE REGIONAL DOMINO EFFECT

The editorial warns that the conflict has escaped bilateral containment:

**Yemen’s Houthis** have expanded targeting from Red Sea shipping to Gulf energy facilities

**Iraq’s Popular Mobilisation Units (PMU)** — Iranian-backed — are threatening US bases in Iraq

**Lebanon’s Hezbollah** — weakened by the 2024 Israeli campaign but not eliminated — retains capacity for northern Israel strikes

**Pakistan:** The Taliban-controlled Afghanistan-Iran border creates a potential Sunni-Shia conflict spillover risk in South Asia

The editorial concludes: **The “controlled escalation” assumption has already failed** — the conflict is spreading faster than any party’s ability to contain it.

## JCPOA — WHAT WAS LOST AND WHAT WAS AT STAKE

The **Joint Comprehensive Plan of Action (JCPOA)** — often called the Iran Nuclear Deal — is central to understanding the current crisis:

**Signed:** July 14, 2015 — Iran + P5+1 (USA, UK, France, Russia, China + Germany) + EU

**Iran’s commitments:** Reduce enrichment to 3.67%; limit centrifuges; allow IAEA inspections; reduce stockpile

**Relief granted:** Lifting of nuclear-related sanctions; ability to sell oil on international markets

**Trump withdrawal:** May 8, 2018 — US unilaterally exited; reimposed “Maximum Pressure” sanctions

**Iran’s response:** Gradually exceeded JCPOA limits — enrichment reached 60%, then 90% (weapons-grade threshold) by 2025

**Biden’s failure:** Indirect talks through Oman (2021–23) failed to revive JCPOA before the 2024 US election

**IAEA (International Atomic Energy Agency):** Vienna-based UN body that monitors nuclear non-proliferation; Iran expelled IAEA inspectors in February 2026 — marking the formal collapse of international verification.

## UPSC RELEVANCE

*Strait of Hormuz (width ~33 km, navigable 3 km each way; ~20% global oil and LNG), JCPOA (2015, P5+1+EU), Operation Prosperity Guardian (US-led Red Sea coalition), India's SPR capacity (5.33 MMT, 9.5 days), Chabahar port (Iran, strategic access), IAEA (Vienna), South Pars gas field (Iran-Qatar shared).*

**Mains GS2:** *India's West Asia policy, strategic autonomy, Hormuz geopolitics, Iran-India relations (Chabahar), India-Israel relations, India-US strategic partnership (QUAD, iCET), nuclear non-proliferation (JCPOA, IAEA), Houthi conflict. GS3:* *Energy security, India's crude import dependence, LNG supply disruption, India's SPR policy, global oil price volatility and India's fiscal impact.*

## ★ FACTS CORNER — KNOWLEDGE PEDIA

### STRAIT OF HORMUZ:

Width: ~33 km (navigable lane: 3 km each way)

Daily oil flow: ~20–21 million barrels (~20% of globally traded oil)

LNG transit: ~20% of global LNG trade

Controlled by: Iran (north coast) + Oman (south coast)

Historical crisis: 1984–88 Tanker War (Operation Earnest Will — US escort convoys)

### JCPOA (IRAN NUCLEAR DEAL):

Full form: Joint Comprehensive Plan of Action

Signed: July 14, 2015

Parties: Iran + P5+1 (USA, UK, France, Russia, China, Germany) + EU

US withdrawal: May 8, 2018 (Trump's Maximum Pressure Campaign)

Iran's enrichment level by 2025: 90% (weapons-grade threshold)

IAEA expelled: February 2026 (Iran expelled IAEA inspectors)

### IRAN'S ENERGY INFRASTRUCTURE:

South Pars gas field: World's largest natural gas field (shared with Qatar as North Field); Iran's side = South Pars

Bandar Abbas: Iran's main commercial port + IRGC naval base on Hormuz

Kharg Island: Handles ~90% of Iran's oil exports (vulnerable to strikes)

### INDIA'S WEST ASIA DEPENDENCIES:

Crude import dependence: 85–88%

West Asia share of crude: ~60%

Qatar LNG share of India's LNG imports: ~50%

India's SPR: 5.33 MMT (~9.5 days coverage) — Vizag (1.33), Mangaluru (1.5), Padur (2.5)

Indian diaspora in Gulf: ~8 million; remittances: ~\$40 billion/year

### CHABAHAR PORT:

Location: Sistan-Baluchestan province, Iran (Gulf of Oman)

India's investment: ~\$500 million (Shahid Beheshti terminal)

Operated by: India Ports Global Ltd (IPGL)

Strategic value: Bypasses Pakistan; access to Afghanistan, Central Asia

US sanctions status: Exempted for humanitarian/connectivity reasons (State Dept waivers)

### KEY REGIONAL ACTORS:

Houthis (Ansar Allah): Backed by Iran; control most of western Yemen; attacking Red Sea + Gulf energy

IRGC-N: Islamic Revolutionary Guard Corps — Navy; controls Hormuz tactics

PMU (Popular Mobilisation Units): Iraq's Iran-backed militias; 200,000+ fighters

Operation Prosperity Guardian: US-led Red Sea naval coalition (2023–); India not a member

### OTHER RELEVANT FACTS:

Osirak precedent: Israel struck Iraq's Osirak nuclear reactor (June 1981) — Iraq accelerated covert programme afterwards

IAEA: International Atomic Energy Agency; HQ Vienna; Director General: Rafael Mariano Grossi (Argentina)

India-Israel defence ties: Israel is India's 2nd largest defence supplier (after Russia); bilateral trade ~\$7 billion

iCET (Initiative on Critical and Emerging Technologies): India-US bilateral framework launched 2023

Sources: The Hindu, IAEA, Al Jazeera

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