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EDITORIAL ANALYSIS

Asia's Energy Emergency – The Hormuz Closure Reveals a Continent Unprepared

INDIAN EXPRESS

25 March 2026

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Asia's Energy Emergency — The Hormuz Closure Reveals a Continent Unprepared

The Indian Express

25 March 2026

GS2

GS3

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The Indian Express

MAINS RELEVANCE:

GS Paper 2

GS Paper 3



INTERVIEW ANGLE

"The Philippines declared an energy emergency within weeks of the Hormuz closure. Is Asia's dependence on Middle Eastern energy a strategic vulnerability that no amount of diversification can solve?"

WHY IN NEWS

The Philippines became the first country to declare a national energy emergency on March 25, 2026, with only 45 days of average fuel supply remaining, as the Strait of Hormuz remains effectively closed following the US-Israel-Iran conflict.

The Editorial Argument

Indian Express argues that the Philippines' declaration is not an isolated crisis but a preview of what awaits the entire Asian continent if the Hormuz disruption persists. Asia imports **60% of its oil from the Middle East**, and the current crisis exposes the collective failure of Asian nations to build adequate strategic reserves, diversify energy sources, or develop robust crisis-response mechanisms.

The Asian Energy Map

COUNTRY	OIL IMPORT DEPENDENCE	SPR (DAYS OF IMPORT COVER)	RISK LEVEL
Philippines	~100%	Minimal	Emergency declared
Japan	~90%	~150 days	High but buffered
South Korea	~90%	~90 days	Moderate
India	85-88%	9.5 days	Critical
China	~72%	~80 days	Moderate
Indonesia	~40% (net importer since 2004)	Limited	High

The editorial notes that **three of Asia’s five largest economies** (Japan, India, South Korea) import over 85% of their crude oil, with a significant share transiting through Hormuz.

The GNSS Dimension

The conflict has also weaponised navigation itself. The **largest documented GPS jamming event in maritime history** has affected 1,650+ vessels, with:

- **30+ jamming clusters** across six Gulf states
- ECDIS and AIS systems rendered unreliable
- Maritime traffic through Hormuz fell to **near-zero** on some days
- Insurance premiums for Gulf transit surged 300-500%

This makes even the alternative routing through **Bab el-Mandeb and the Red Sea** risky, as GPS spoofing extends across the wider Arabian Sea.

India’s Multiple Vulnerabilities

The editorial highlights that India faces a **quad vulnerability**:

- 1 **Energy:** 85-88% oil import dependence, 9.5-day SPR
- 2 **Diaspora:** 9 million Indians in Gulf countries
- 3 **Remittances:** \$40 billion annually from Gulf
- 4 **Trade:** Gulf countries are among India’s top 10 trading partners

Unlike Japan and South Korea (which have 90-150 days of reserves), India’s 9.5-day buffer means the country is essentially operating without a safety net.

Lessons from History

CRISIS	YEAR	INDIA’S RESPONSE
Gulf War I	1990-91	Airlift of 1,11,000 Indians from Kuwait/Iraq
Yemen civil war	2015	Operation Rahat — evacuated 4,640 Indians + 960 foreigners
COVID pandemic	2020-21	Vande Bharat Mission — largest repatriation in history
Iran-Hormuz crisis	2026	SPR at 9.5 days; no evacuation plan announced yet

Policy Recommendations

- 1 **Asian Energy Security Alliance:** India, Japan, South Korea, ASEAN should create a joint strategic reserve pooling mechanism
- 2 **Accelerate renewables:** Every GW of solar/wind installed permanently reduces oil dependence

- ③ **Chabahar-INSTC route:** India's alternative to Hormuz via Iran's Chabahar Port and the International North-South Transport Corridor
- ④ **Nuclear energy expansion:** India's 22 operating reactors provide only 3% of electricity — target 10% by 2035
- ⑤ **LNG diversification:** Secure long-term LNG contracts from Australia, US, and Mozambique (non-Hormuz routes)

UPSC RELEVANCE

Strait of Hormuz, ASEAN members, Operation Rahat, Chabahar Port, INSTC, SPR locations, IEA

India's energy diplomacy; diaspora protection; multilateral cooperation on energy security

Energy security; maritime security and chokepoints; strategic reserves

★ FACTS CORNER — KNOWLEDGEPEDIA
PHILIPPINES ENERGY EMERGENCY:

First country to declare energy emergency (March 25, 2026)

President: Ferdinand Marcos Jr

Average fuel supply: ~45 days

Pump price surge: ~200%

Target procurement: 1 million barrels

STRAIT OF HORMUZ:

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

Daily crude flow: ~20 million barrels

Global oil trade: ~20%

Global LNG: ~25-30%

Countries bordering: Iran, Oman, UAE

INDIA'S GULF EXPOSURE:

Indians in Gulf: ~9 million

Gulf remittances: ~\$40 billion/year

Oil via Hormuz: 60-65% of imports

SPR: 9.5 days (IEA recommends 90)

OTHER RELEVANT FACTS:

Operation Rahat (2015, Yemen): evacuated 4,640 Indians + 960 foreigners

Chabahar Port: India's bypass to Hormuz for Central Asian access

INSTC: International North-South Transport Corridor (India-Iran-Russia)

Vande Bharat Mission (2020): largest civilian repatriation

ASEAN: 10 member states

Sources: [Indian Express](#), [Bloomberg](#), [Al Jazeera](#)

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