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EDITORIAL ANALYSIS

Iran's Endgame — Why West Asia's Outcome Will Reshape India's Strategic Calculus



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 The Indian Express

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The Indian Express

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INTERVIEW ANGLE

"India has maintained strategic silence on the Iran-Israel-US conflict. Is this prudent multi-alignment or a failure of diplomatic leadership?"

WHY IN NEWS

The **2026 Iran war** — triggered by US-Israeli strikes on February 28, 2026 targeting Iranian nuclear and military infrastructure — has entered its **second month** with no ceasefire in sight. Iran rejected the US **15-point ceasefire proposal** on March 25, while the **Strait of Hormuz** remains effectively shut. India, home to **9 million nationals in the Gulf** and dependent on the region for **85-88% of its crude oil**, faces a multi-dimensional strategic crisis that the Indian Express editorial calls “the most consequential geopolitical test since 1991.”

THE CONFLICT ARCHITECTURE

The current crisis did not emerge overnight. It is the culmination of years of escalating tensions between Iran, Israel, and the United States — with the collapse of the **JCPOA (Iran nuclear deal)** and a 12-day air conflict in 2025 serving as precursors.

The February 28 Strikes

On **February 28, 2026**, US and Israeli forces launched **nearly 900 strikes in 12 hours**, targeting Iranian missiles, air defences, military infrastructure, nuclear facilities, and leadership. The strikes resulted in the **death of Supreme Leader Ali Khamenei** — a development that has fundamentally altered Iran’s internal politics and hardened its stance against negotiation.

Iran's Response — The Hormuz Blockade

Iran’s Islamic Revolutionary Guard Corps (IRGC) retaliated with missile and drone attacks on US military bases, Israeli territory, and Gulf states. Critically, the IRGC **prohibited vessel passage through the Strait of Hormuz**, creating the **world’s largest energy supply disruption since the 1973 oil crisis**.

STRAIT OF HORMUZ — KEY DATA

Width	~33 km (navigable lane: 3 km each way)
Daily crude oil transit	~20 million barrels
Share of global traded oil	~20%
Share of global LNG trade	~25-30%
Annual energy trade value	~USD 500 billion

INDIA'S FIVE-DIMENSIONAL EXPOSURE

The editorial argues that India's exposure to the Iran-West Asia crisis operates across five distinct dimensions — energy, diaspora, connectivity, trade, and diplomacy. Each demands a different response, and they often pull in opposite directions.

1. Energy Security — The Immediate Crisis

India imports **85-88% of its crude oil**, with the Gulf region historically supplying over **60% of India's crude imports**. The Hormuz closure has disrupted supply chains for crude oil, LNG, and petroleum products.

India's Strategic Petroleum Reserve covers only **9.5 days of consumption** at a capacity of **5.33 MMT** — and reserves are only **64% full (3.37 MMT)**. The IEA recommends **90-day coverage**. Japan holds **140 days** and South Korea holds **90 days** of strategic reserves.

The editorial notes that India has been **scrambling to diversify sourcing** — increasing imports from Russia (already India's largest supplier since 2022), the US, Guyana, and Brazil. But pipeline logistics and refinery configurations cannot be changed overnight.

2. Diaspora — 9 Million Indians at Risk

Approximately **9 million Indians live and work in Gulf countries**, primarily in **oil services, construction, hospitality, and retail** — sectors directly exposed to conflict disruption. These workers come disproportionately from **Kerala, Uttar Pradesh, Bihar, and West Bengal**.

INDIAN DIASPORA IN THE GULF

Total Indians in Gulf	~9 million
Annual remittances from Gulf	~USD 51.4 billion (38% of India's total inflows)
India's total remittances (FY 2025)	USD 135.4 billion (world's largest recipient)
Indians evacuated since war began	3,75,000+
Indians evacuated from Iran	~1,000 (including 700+ medical students)

Remittance impact: The Gulf contributes **USD 51.4 billion annually** to India's remittance inflows. A prolonged conflict threatens this lifeline. However, a short-term anomaly has emerged — banks report **20-30% higher transfers in March 2026** as workers make anxiety-driven remittances, a phenomenon reminiscent of the **2020 COVID repatriation surge**.

Evacuation scale: India has evacuated over **3,75,000 nationals** since the war began, with Qatar Airways alone flying **7,600 Indians home from Doha in three days**. But the editorial warns that a full-scale escalation could require evacuating **millions** — a logistical challenge that dwarfs **Operation Rahat (Yemen, 2015)**, which evacuated 4,640 Indians and 960 foreigners.

3. Connectivity — The Chabahar Collapse

India's **Chabahar Port project** — its gateway to Afghanistan and Central Asia bypassing Pakistan — has effectively been frozen. The **2026-27 Union Budget allocated zero funds** for Chabahar. India has completed its financial commitment of **approximately USD 120 million**, but the **US sanctions waiver expires April 26, 2026**, and government-nominated directors of **India Ports Global Ltd (IPGL)** have resigned en masse.

The editorial describes Chabahar as a “strategic asset that India invested in for a decade and is now watching collapse in real time.”

4. Trade Disruption — Beyond Oil

India's bilateral trade with the Gulf Cooperation Council (GCC) countries exceeds **USD 180 billion annually**. The conflict has disrupted not just energy flows but also:

- **Gold imports** from the UAE (India's largest gold source)
- **Fertiliser and petrochemical imports** from Saudi Arabia and Qatar
- **Re-exports** through Dubai to Africa and Central Asia
- **Aviation routes** — several airlines have suspended or rerouted Gulf flights

5. Diplomatic Tightrope — Multi-Alignment Under Stress

India has maintained what the editorial calls “**strategic ambiguity**” — neither condemning the US-Israeli strikes nor explicitly supporting Iran. This reflects India’s **multi-alignment doctrine** (Jaishankar’s “India will be on India’s side”), but the editorial argues it is becoming increasingly untenable.

THE NEGOTIATION STALEMATE

As of late March 2026, the conflict remains at an impasse.

US Position

The US has offered Iran a **15-point ceasefire proposal** that includes: Iran relinquishing control over the Strait of Hormuz, dismantling its nuclear enrichment programme, and withdrawing support for Hezbollah and Houthi proxies. **President Trump has extended the compliance deadline** multiple times while deploying **thousands more troops** to the region.

Iran’s Five Conditions (March 25, 2026)

Iran rejected the US proposal through intermediaries and presented **five counter-conditions**:

- ① End of all US and Israeli attacks on Iran
- ② End of attacks on pro-Iranian forces in Lebanon and Iraq
- ③ Creation of mechanisms to prevent war resumption
- ④ Compensation for damage caused by strikes
- ⑤ International recognition of Iranian **sovereignty** over the Strait of Hormuz

The editorial notes that **condition 5 — sovereignty over the Strait** — is a non-starter for the international community, as the strait is governed by the **UN Convention on the Law of the Sea (UNCLOS)** and the principle of **transit passage**.

BOTH SIDES OF THE ARGUMENT

The Case for India’s Strategic Silence

- India cannot afford to antagonise the US — its largest trade partner, technology source, and Quad ally
- Condemning the strikes would alienate Israel, with which India has a **USD 10 billion annual defence trade relationship**
- India’s oil diversification (Russia now supplies ~40% of crude imports) reduces dependence on Gulf stability
- Evacuation operations have been effective — 3,75,000 Indians safely returned demonstrates operational capability

- Historical precedent: India maintained neutrality during the **1990 Gulf War** and benefited from relationships with all parties post-conflict

The Case Against Silence

- India's credibility as a **"Voice of the Global South"** is undermined when it says nothing about a conflict devastating a fellow developing region
- The **Chabahar retreat** signals to partners (Afghanistan, Central Asian states) that India's strategic commitments are unreliable under US pressure
- India's **BRICS presidency** in 2026 demands a leadership role on global peace and security — silence is not leadership
- The **Hormuz disruption is costing India billions** — without diplomatic engagement, India is absorbing economic damage while having no influence on the outcome
- China has been **actively mediating** (building on the 2023 Saudi-Iran normalisation), gaining diplomatic capital in a region where India has retreated

WAY FORWARD

Immediate Actions

- **Activate Operation Dost** — a pre-planned mass evacuation framework for Gulf Indians, with pre-positioned ships and aircraft at Thiruvananthapuram, Mumbai, and Kochi
- **Fast-track SPR Phase II** — emergency procurement to fill existing reserves to 100% and accelerate Chandikhol construction
- **Issue a calibrated statement** through the BRICS chair calling for immediate humanitarian corridors and freedom of navigation in the Strait of Hormuz — this positions India as a rules-based advocate without taking sides on the war itself

Medium-Term Restructuring

- **Establish a Gulf Crisis Management Cell** within the MEA — a permanent institutional mechanism (not ad hoc) for diaspora protection, energy coordination, and diplomatic engagement
- **Negotiate a long-term energy security agreement** with Saudi Arabia and the UAE that includes supply guarantees during regional conflicts — building on the India-UAE CEPA framework
- **Diversify the Chabahar bet** — explore alternative connectivity routes through Oman (Duqm Port) and Iraq (Faw Grand Port) that are less exposed to Iran sanctions

Structural Reforms

- **Raise SPR capacity to 90 days** (in line with IEA standards) within 10 years — this requires roughly **45-50 MMT** of storage, a tenfold increase

- **Create an Indian Ocean Maritime Security Fund** — a **multilateral** mechanism (with Japan, Australia, France, India) to ensure freedom of navigation in critical chokepoints
- **Build a national remittance resilience framework** — financial instruments (remittance bonds, diaspora mutual funds) that allow Gulf workers to hedge against conflict-driven income disruption

UPSC RELEVANCE

Strait of Hormuz dimensions and oil transit data, JCPOA, UNCLOS transit passage, India's SPR locations and capacity, Operation Rahat, Chabahar Port, India's oil import dependence percentage.

MAINS GS-II:

India's West Asia policy; multi-alignment doctrine; diaspora protection; India-Iran relations; BRICS presidency and conflict mediation; freedom of navigation and UNCLOS.

★ FACTS CORNER — KNOWLEDGE PEDIA

2026 IRAN WAR — TIMELINE:

February 28, 2026: US-Israeli forces launch ~900 strikes in 12 hours on Iran

Supreme Leader Ali Khamenei killed in strikes

Iran retaliates with missiles/drones on US bases, Israeli territory, Gulf states

IRGC imposes shipping ban through Strait of Hormuz

March 25: Iran rejects US 15-point ceasefire proposal; presents five counter-conditions

March 26: Trump extends compliance deadline again

STRAIT OF HORMUZ:

Width: ~33 km; navigable lane: 3 km each way

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

~25-30% of global LNG also transits through the strait

Annual energy trade value: ~USD 500 billion

Governed by: UNCLOS (transit passage regime)

INDIAN DIASPORA IN THE GULF:

Total Indians: ~9 million

Key source states: Kerala, Uttar Pradesh, Bihar, West Bengal

Sectors: oil services, construction, hospitality, retail

Annual remittances from Gulf: ~USD 51.4 billion (38% of total)

India's total remittance inflows (FY2025): USD 135.4 billion (world's largest)

Indians evacuated since February 2026: 3,75,000+

Evacuated from Iran: ~1,000 (including 700+ medical students)

INDIA'S OIL IMPORT DEPENDENCE:

Import dependence: 85-88% of crude oil needs

SPR capacity: 5.33 MMT (Vishakhapatnam 1.33 + Mangaluru 1.5 + Padur 2.5)

SPR coverage: ~9.5 days of consumption

Current fill: 3.37 MMT (~64% capacity)

Phase II: 6.5 MMT (Chandikhol 4 MMT + Padur 2.5 MMT); target 2029

IEA recommended cover: 90 days

CHABAHAR PORT:

India's financial commitment: ~USD 120 million (fully transferred)

US sanctions waiver: expires April 26, 2026

India Ports Global Ltd (IPGL): directors resigned post-sanctions

2026-27 budget allocation: Zero

Strategic purpose: Bypass Pakistan for access to Afghanistan and Central Asia

HISTORICAL EVACUATIONS BY INDIA:

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

Kuwait evacuation (1990): ~1,76,000 Indians airlifted — then the largest civilian airlift

2026 Iran war evacuations: 3,75,000+ (ongoing, largest since 1990)

JCPOA (IRAN NUCLEAR DEAL):

Signed: July 2015 (Iran + P5+1)

US withdrew: May 2018 (Trump administration)

Iran began exceeding enrichment limits: 2019 onwards

Collapsed formally: 2025-26 negotiations failed

OTHER RELEVANT FACTS:

CAATSA: US law that can sanction countries buying Russian weapons or Iranian oil

India-Israel defence trade: ~USD 10 billion annually

Trump tariff threat: 25% tariff on countries doing business with Iran (announced January 12, 2026)

China brokered Saudi-Iran normalisation in March 2023

India-UAE bilateral trade: ~USD 85 billion (CEPA signed February 2022)

India-GCC total bilateral trade: exceeds USD 180 billion annually

Sources: [Indian Express](#), [Al Jazeera](#), [NPR](#), [CNBC](#), [PIB](#)



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