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EDITORIAL ANALYSIS

Asia Needs a New Energy Security Architecture — The Case for an Asian Energy Collaborative Compact

THE HINDU

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Editorial Summary

The Hindu’s editorial argues that Asia’s energy security architecture is dangerously inadequate — despite the region containing the world’s largest oil importers (China, India, Japan, South Korea). Repeated geopolitical shocks — the Yom Kippur War oil embargo (1973), Russia-Ukraine disruptions (2022), and the current West Asia conflict threatening Strait of Hormuz flows — have exposed Asia’s vulnerability without producing a coordinated institutional response. The editorial proposes an **Asian Energy Collaborative Compact (AECC)** — a regional body that would pool strategic petroleum reserves (SPR), aggregate collective bargaining power with OPEC+ exporters, coordinate emergency supply responses, and accelerate shared renewable energy infrastructure (cross-border grids, joint R&D). It explicitly notes the contrast with the **International Energy Agency (IEA)** — which was created after 1973 but includes no major Asian developing nation as a full member.

The IEA Gap — Why Asia is Excluded

Feature	IEA
Full name	International Energy Agency
Founded	1974 (response to 1973 oil embargo)
HQ	Paris, France
Members	32 countries — primarily OECD (developed) nations
India’s status	Association country (since 2017) — NOT a full member
China’s status	Association country — NOT a full member
Why excluded	IEA membership requires OECD membership + certain SPR levels
Role	Energy security coordination, data, policy analysis

The problem: The world’s largest oil importers — China, India, Japan, South Korea — operate under different rules. Japan and South Korea are full IEA members; China and India (together consuming ~30% of global oil) are only associates with no binding obligations or emergency drawing rights.

Asia’s Energy Vulnerability

Country	Oil Import Dependence	Key Chokepoints
India	~85% of crude oil imported	Strait of Hormuz, Malacca
China	~75% of crude oil imported	Strait of Hormuz, Malacca
Japan	~92% of crude oil imported	Strait of Hormuz
South Korea	~93% of crude oil imported	Strait of Hormuz

Key Chokepoints

Strait of Hormuz: Between Iran and Oman; ~20% of global oil trade passes through it. Iran has threatened closure multiple times; the 2026 West Asia conflict has renewed those threats.

Strait of Malacca: Between Malaysia, Indonesia, Singapore; ~80% of Asia-Pacific’s oil passes through it. Piracy risk, physical narrowness.

Proposed AECC — Features

Element	Detail
Strategic reserves	Pool member nations’ SPRs; coordinate emergency releases
Bargaining power	Collective negotiation with OPEC+ — aggregated demand reduces price volatility
Renewable cooperation	Joint cross-border grid projects (mirrors ADB’s Pan-Asia Power Grid)
Data sharing	Common energy database for real-time supply-demand intelligence
Membership	Open to major Asian importers: India, China, Japan, South Korea, ASEAN
India’s role	Natural leader given diplomatic heft, geographical centrality, energy transition ambitions

India's Strategic Opportunity

India's **OSOWOG (One Sun One World One Grid)** initiative — championed at G20 and COP — aligns directly with the AECC's renewable cooperation pillar. India could leverage AECC to accelerate cross-border solar and hydro trade (Nepal, Bhutan, Central Asia).

India's Current Energy Security Measures

Measure	Detail
Strategic Petroleum Reserve (SPR)	~5.3 million tonnes (Vizag, Mangaluru, Padur) — ~9.5 days of import cover
SPR target	12–15 days cover
Diversification	Oil from Russia (surge post-2022), Middle East, USA, Africa
Renewables	283.46 GW non-fossil capacity; reducing oil in power sector
Refinery capacity	~254 MTPA (among world's largest)
Gas import	LNG imports from Qatar, USA, Australia

India's SPR covers only ~9.5 days — the IEA standard for member nations is **90 days**. This gap is the core vulnerability the AECC would address collectively.

UPSC Relevance

Paper	Angle
GS2 — International Relations	IEA, multilateral energy institutions, India-OPEC, Strait of Hormuz
GS3 — Economy	Energy security, SPR, oil import dependence, price volatility
GS3 — Environment	Fossil fuel dependence, renewable alternatives, cross-border energy trade

Mains Keywords: AECC, IEA, energy security, Strait of Hormuz, strategic petroleum reserve, OPEC+, oil import dependence, India energy security, OSOWOG, West Asia conflict, Pan-Asia Power Grid, ADB

Prelims Facts Corner

Item	Fact
IEA founded	1974; response to 1973 oil embargo
IEA HQ	Paris, France
IEA members	32 (mainly OECD); India and China are association countries only
India in IEA	Association since 2017; NOT a full member
Strait of Hormuz	Between Iran and Oman; ~20% of global oil trade
Strait of Malacca	~80% of Asia-Pacific oil passes through
India SPR	~5.3 million tonnes; Vizag, Mangaluru, Padur; ~9.5 days cover
IEA SPR standard	90 days for full members
India oil import dependence	~85% of crude oil imported
OSOWOG	One Sun One World One Grid — India's global solar grid initiative

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