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IMEC — Caught Between Commerce and Geopolitics

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CURATED & WRITTEN BY

**Bharat Choudhary**

UPSC Educator & Content Creator

 [linkedin.com/in/epicbharat](https://www.linkedin.com/in/epicbharat)

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IMEC — Caught Between Commerce and Geopolitics

 **The Hindu** 2 June 2026 **GS2** **GS3**

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INTERVIEW ANGLE

"IMEC crosses two of the world's most unstable regions. Should India treat it as a commercial corridor, a strategic counter to the BRI, or an active diplomatic responsibility?"

West Asian conflict has both strengthened IMEC's strategic case and disrupted its original Israel-centred routing. The corridor must evolve into a flexible multi-route framework with alternatives via Oman and Egypt to survive geopolitical turbulence.

THE ARGUMENT IN ONE LINE

IMEC is necessary, disrupted, and re-designable — invest in the stable segments, build in route optionality, and decouple infrastructure from political track.

IMEC IN BRIEF

PARAMETER	DETAIL
Full form	India-Middle East-Europe Economic Corridor
Launched	G20 New Delhi Summit, September 2023
Route	India (Mundra/JNPT) → UAE (sea) → Saudi Arabia → Jordan → Israel → Greece → Europe (rail/road)
Components	Port connectivity + railway + energy + data cables
Signatories	India, USA, UAE, Saudi Arabia, EU, Israel, Jordan, France, Germany, Italy

THE DISRUPTION

- **Iran-Israel-US conflict** → Israel's involvement = contentious for Saudi Arabia, Jordan, and Arab states.
- **Saudi-Israel normalisation** (Abraham Accords follow-through) has stalled; Saudi Arabia conditions it on credible Palestinian statehood pathway.
- IMEC's **overland Israel segment** is effectively paused.

THE STRATEGIC CASE — STILL INTACT

- **Hormuz bypass** — ~85% of India's crude; 25% of global LNG transits.
- **Suez backup** — alternative to the congested, blockage-vulnerable Suez Canal.
- **BRI counter** — a commercially viable, democratic alternative.

UPSC RELEVANCE

PAPER	RELEVANCE
GS2	India-Middle East relations; IMEC; BRI; G20; West Asia
GS3	Infrastructure; trade corridors; energy security
Prelims	IMEC launched G20 Sept 2023; signatories; Mundra/JNPT; Hormuz; Suez

Sources: *The Hindu*, Ministry of External Affairs

Source: IMEC — Caught Between Commerce and Geopolitics — Ujjayari.com | Free UPSC & State PCS Editorial Analysis

● KEY ARGUMENTS AT A GLANCE

The Iran-Israel-US conflict has simultaneously strengthened the case for IMEC as a Hormuz/Suez bypass while threatening its viability through regional instability, and the corridor must evolve into a flexible, multi-route framework with alternative port options in Oman and Egypt to survive ongoing West Asian turbulence.


SUPPORTING

- IMEC's original route — India-UAE-Saudi Arabia-Jordan-Israel-Greece-Europe — is disrupted: Israel's ongoing conflict with Iran and Hamas and strained Saudi-Israel normalisation make the overland segment unreliable for now.
- The same conflict, however, reinforces the strategic case for alternatives to the Strait of Hormuz and Suez Canal; IMEC's rail and port infrastructure serves as insurance against future choke-point closures.
- India has a significant stake: IMEC links Mundra/JNPT to European markets through infrastructure investments in the Gulf; diversifying away from a single maritime route improves economic resilience.


COUNTER

Critics argue IMEC is hostage to the Israel normalisation question — Saudi Arabia will not ratify full IMEC operationalisation unless there is credible progress on a Palestinian state — and that the corridor is more a geopolitical signalling exercise than a near-term commercial reality.


WAY FORWARD

Build in route optionality: Oman-based corridors (via Duqm) as an Hormuz bypass; Egyptian rail (Port Said-Suez Economic Zone) as a Suez alternative; invest in the sections that are geopolitically stable and decouple the corridor's phased activation from the Israeli-Palestinian political track.

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MAINS ANSWER FRAMEWORK
QUESTION

"The India-Middle East-Europe Economic Corridor is at once an opportunity and a hostage to West Asian geopolitics." Critically examine. (250 words)

INTRODUCTION

The India-Middle East-Europe Economic Corridor (IMEC), launched at the G20 New Delhi summit (September 2023), promised a transformative connectivity link from India to Europe via the Gulf. The escalating West Asia conflict has turned that promise into a governance and geopolitical challenge.

BODY

IMEC's intended route — India to UAE by sea, then rail through Saudi Arabia, Jordan, and Israel to Greece and Europe — passes through the most geopolitically contested geography in the world. The Iran-Israel-US confrontation has not only made Israeli participation contentious but raised questions about Saudi security guarantees and Jordanian corridor stability.

At the same time, the conflict reinforces the economic logic of IMEC: the Strait of Hormuz (85% of India's crude) and the Suez Canal are both exposed to closure risk, and a land-based alternative would provide insurance. India's response should be pragmatic: decouple IMEC's commercial development from its political track by investing in stable sub-segments (India-UAE sea leg, UAE-Saudi rail where secured) and building in route optionality — Oman-based bypasses and Egyptian rail as alternatives. IMEC should also be framed not as a rival to BRI but as a commercially viable alternative — infrastructure led by market demand, not state subsidies.

CONCLUSION

IMEC's long-term viability depends on treating it as infrastructure diplomacy — investing in the stable portions now and designing flexibility for the contested segments later. Commerce and geopolitics will remain entangled in West Asia; the corridor's institutional design must accommodate this rather than pretend it can be resolved first.

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