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Article - 1: Diversification as India's Geo-economic cushion in a volatile oil order

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Diversification as India's Geoeconomic Cushion in a Volatile Oil Order

AUTHOR: MANISH VAID

Expert Speak Terra Nova
Published on Mar 27, 2026

Diversification has not reduced India's exposure to global oil shocks, but it has reduced the risk that any single chokepoint or supplier can paralyse its energy system

Author



Context The ongoing conflict involving the U.S., Israel & Iran has triggered global oil volatility, exposing India's energy vulnerabilities. However, India's post-2022 diversification strategy has improved its resilience against such shocks.

Facts

Following the escalation, Brent crude briefly touched \$ 101.6 per barrel by March 12, 2026.

Russia has become a central supplier, accounting for ~35.8% of India's crude import volumes in FY 2024-25.

India now routes 70% of its crude imports through corridors outside Strait of Hormuz.

India possesses a sophisticated refining base with a capacity of 256.8 MMTPA, allowing it to process diverse crude grades.

Analytical Crux

The article suggests that India's resilience is built on 'supplier optionality' and 'refining flexibility' rather than true energy independence. By sourcing from 40 different countries & investing in complex refineries, India can dynamically rebalance its oil slate when specific chokepoints (Strait of Hormuz) are threatened. However, the author warns that this is "relative leverage", not immunity. The real danger in the current conflict is a 'logistics war' - where rising insurance costs and tanker scarcity matter more than the sticker price of oil - necessitating a shift toward treating 'chokepoint risk' as a permanent design constraint in national policy.

Verbatim Quotes

"The Strait of Hormuz is the clearest reminder that physical constraints affect supply chains faster than prices can adjust."

"India hasn't solved its import dependence problem, but it has reduced the danger that a shock in one place, cripples its entire oil system."

Article - 2 : Treading transboundary waters



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Treading Transboundary Waters: India and its Neighbours

Conceptualisation: Debarshee Dasgupta, Subia Ahmad, Amaaz Zaman & Archit Shukla.

Design: Vanshika Kabra

South Asia is home to some of the most expansive and complex river systems in the world. These river systems — the Ganges, Indus, and Brahmaputra — transcend the boundaries of modern nation-states, cutting across the borders of the Indian subcontinent and China. There is also a long history of infrastructural development along these rivers, often embedded in the post-colonial state-building narratives in South Asia. These rivers are an inseparable part of the region's rich cultural, ecological, and geopolitical fabric and are governed by various formal and informal international and internal arrangements.

India manages its transboundary rivers through formal bilateral arrangements shaped by a long history of coexisting conflict and cooperation. These agreements, treaties, and protocols were mostly instituted in the latter half of the twentieth century. The recent triggers — the 'abeyance' of the Indus Water Treaty by India, China's proposed mega dam on Yarlung Tsangpo (Brahmaputra), and the approaching expiry of the Ganga Water Treaty in 2026 along with the unresolved Teesta issue between India and Bangladesh have been long in the making — indicating that in the last three decades, the region as a whole has transformed

Context

South Asia's transboundary rivers like Ganga, Indus & Brahmaputra face mounting pressures from climate change, geopolitical shifts & expiring treaties, complicating India's water-sharing with neighbors.

Facts

- The Ganga Water Treaty is approaching its expiry in 2026, urgent need for renegotiation between India & Bangladesh.

- China is proposing a 'megadam' on Yarlung Tsangpo (Brahmaputra) may alter water flow into India and Bangladesh.

- Projects like Siang Upper Multi-purpose project (SUMP) in Arunachal are designed not just for power, but as strategic buffers against upstream flow variations.

- The article notes the recent "abeyance" of Indus Water Treaty by India, signaling departure from water-sharing agreements.

Analytical Crux

The article highlights that South Asia's river-sharing framework, built decades ago, is no longer sufficient for today's realities. Climate change is altering river flows, geopolitical tensions are increasing - especially with China's upstream actions - and domestic pressures like water demand, federal politics and infrastructure projects are shaping India's external water relations. While treaties earlier ensured stability, they lack mechanisms to deal with modern challenges like ecological degradation, extreme weather events & technological advancements. Therefore, India needs to rethink its hydro diplomacy with a more flexible, science-based and cooperative approach that integrates domestic and international priorities.

Verbatim Quotes

"These rivers transcend the boundaries of modern nation states."

"A long history of coexisting conflict and cooperation."

"The existing water-sharing arrangements do not effectively address contemporary challenges."

Article - 3 : Iran will determine the endgame



RAM RAJYA
BY RAM MADHAV

Iran, not America or Israel, will determine the endgame

WHILE DRAFTING the US Constitution, in *The Federalist Papers*, James Madison raised a pertinent question: *Quis custodiet ipsos custodes* (Who guards the guardians?). This was prompted by an earlier query posed by Alexander Hamilton while opening *Federalist No. 1*: "whether societies of men are really capable or not of establishing good government from reflection and choice, or whether they are forever destined to depend for their political constitutions on accident and force". Given human fallibility, the makers of the US Constitution envisaged a system of checks and balances by building various institutions with equal authority. "Ambition must be made to counteract ambition," Madison proclaimed.

Donald Trump has either not read *The Federalist Papers* or does not care to abide by the wisdom of America's constitution-makers. He believes in his own wisdom and refuses to be guided by any internal authority, be it Congress or the judiciary. He believes in the doctrine of "strategic inconsistency" and loves to keep the world on tenterhooks. It seemed to have worked well for a year, forcing many world powers to kneel. But one country, Iran, is posing a serious challenge to that, succeeding in turning Trump's "strategic inconsistency" into "strategic incoherence".

America and Israel began their military campaign against Iran a

month ago with the stated aim of "regime change". Supreme Leader Ayatollah Ali Khamenei and dozens of senior officials have been eliminated. But far from collapsing, the regime has continued to challenge the US and Israel through its asymmetric capability. It is clear that Iran, not America or Israel, will now determine how and when to end the war.

The Americans are struggling to find an exit plan. Some of them are now talking about "change in the regime" instead of "change of the regime". Trump even talked about the joint management of the Strait of Hormuz with "the Ayatollah". We were told after last year's missile attacks that Iran's nuclear capability was completely destroyed. But the US now says that the "removal of all the highly enriched uranium" would be one of its demands for ending the war. So, we now learn that the stockpiles are safely concealed and Iran's nuclear capability is far from finished.

Wars are easy to start but difficult to end. Yet, every country that goes to war — Russia or Israel or America — thinks otherwise. In this age, all wars have global consequences. The Ukraine war caused severe food shortages across continents. The Iran war is leading to an "energy emergency". Countries now realise that not only terror groups like the Houthis, but even sovereign nations can use global commons as bargaining chips.

Iran's biggest victory is in forcing the US to the negotiating table. America's biggest failure is turning to Pakistan, a rentier state known for its own lawlessness, for mediation. The US has tried to elicit support from its European and Asian allies. But none came forward. The UK, France, Germany, Spain and Italy refused to join the war effort, and countries like Poland, the Czech Republic, Bosnia and Herzegovina, and Albania have remained passive supporters.

India, too, wisely opted to stay out of the conflict. Ignoring taunts by an unimaginative Opposition, the Indian government stuck to the line that de-escalation, negotiations and diplomacy should be the way forward. No major power wanted to take the risk of mediating between the ayatollahs and Trump. Oman, a middle power, made valiant efforts with its foreign minister, Badr bin Hamad Al Busaidi, shuttling between capitals till the last moment to avoid war. In the end he, too, lamented that "active and serious negotiations... were undermined".

Is strategic neutrality the only right option in such situations? In the face of total failure of global multilateral institutions as evidenced during the Ukraine and Iran wars, shouldn't major powers take a more proactive role in settling disputes before they turn into conflicts, allowing failed regimes Pakistan to pretend to be peacemakers?

The writer, president, India Foundation, is with the BJP

Wars are easy to start but difficult to end. Yet, every country that goes to war — Russia or Israel or America — thinks otherwise

Context The article critiques the Trump administration's military campaign against Iran in 2026, contrasting the "strategic inconsistency" of modern U.S. foreign policy with foundational American principles of checks, balances and institutional wisdom.

Facts

The conflict was initiated with aim of 'regime change' in Iran, targeting leadership.

Iran has responded using asymmetric warfare, preventing quick victory.

European powers like United Kingdom, France & Germany refused to join the war.

India maintained strategic neutrality, advocating diplomacy & de-escalation.

Analytical Crux

The article argues that modern wars are no longer easily controllable and strategies based on unpredictability can backfire. Trump's "strategic inconsistency" initially created pressure on adversaries but has now turned into confusion and lack of direction, especially as Iran resists effectively. The conflict also highlights the declining role of global institutions and alliances, as major powers hesitate to intervene. It raises a deeper question: whether countries like India should continue with strategic neutrality or adopt a more proactive diplomatic role in conflict resolution in an increasingly unstable global order.

Verbatim Quotes

"Ambition must be made to counteract ambition."

"Who guards the guardians."

"Strategic inconsistency has turned into strategic incoherence."

"Wars are easy to start but difficult to end."

"In this age, all wars have global consequences."

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