

# PSIR & GS-2 Daily Brief

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# Article - 1: Mapping the Geoeconomic fallout for India from West Asian conflict



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## Mapping the Geoeconomic Fallout for India from West Asian Conflict

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April 17, 2026 Views: 854 Comments: 0

## Context

The article explains how the West Asian conflict is hurting India not only through oil prices, but also through fertilizers, LNG, shipping, remittances, exports & overall economic connectivity.

## Facts

- Every \$10 Brent rise adds \$12-13 billion to India's import bill and 0.3% of GDP to CAD.

- India's trade with GCC is large: \$56.9 billion exports and \$121.7 billion imports.

- 45% of India's petrochemical intermediates are Gulf-sourced.

- Cape routing adds 15 days & roughly doubles freight costs.

## Analytical Crux

India's dependence on West Asia is much wider than crude oil. It runs through LNG, fertilizers, petrochemicals, shipping routes, remittances and export markets. So, the real danger is not only costly imports, but the breaking of economic connectivity, which can hit farming, industry & state economies together. India now needs long-term resilience through diversification, shipping capacity, insurance cover, buffer stocks and new energy options. In the coming years, India's strength will depend on its ability to keep supplies moving even during conflict.

## Verbatim Quotes

"Economic policy must focus on the stability of supply, the creation of resource buffers and the diversification of routes and payment systems." - Dr. Anantha Nageswaran

"Ultimately, the ability to maintain flow despite friction, will decide India's geoeconomic and geopolitical power going forward." - Purna Gandhi

## Article - 2: Three scenarios for the Gulf States after the Iran War



GCC Secretary-General Jassim al-Budaiwi speaks in Doha, Qatar, in 2025. (Photo by Noushad Thekkayil/NurPhoto via Getty Images)

COMMENTARY E EMISSARY

### Three Scenarios for the Gulf States After the Iran War

One is hopeful. One is realistic. One is cautionary.



**Context** The article discusses the three possible paths before the Gulf monarchies after the Iran war and shows why GCC unity has become both more necessary and more difficult.

### Facts

- All six GCC states came under Iranian missile and drone threat.
- Iran still retains highly enriched uranium and its nuclear programme.
- GCC unity has historically been weak enough to block even a currency union and a joint security force.

## Analytical Crux

The article shows that Gulf security cannot rest fully on outside powers. Even after heavy U.S. and Israeli military action, Iran remains capable of shaping the Gulf balance. That is why the real test before the GCC is whether it can build collective capacity in air defence, logistics and trade corridors. But old rivalries, different views on Iran and Israel and competition for influence make deep unity difficult. So limited cooperation looks most likely, while a fresh Gulf rift remains a serious possibility.

## Verbatim Quotes

“And the GCC has no seat at the table, despite its entreaties, for negotiations that will shape the bloc's economic and security environment for years to come.”

“A more unified GCC would be much harder for the US, Israel & Iran to ignore the next time they are deciding whether to throw the Gulf into chaos.”

# Article - 3 : A political setback for government, a democratic opening for Opposition

## A political setback for government, a democratic opening for Opposition

**T**HE DEFEAT of the Constitution (One Hundred and Thirty-First Amendment) Bill, 2026, is an embarrassment for the government, a reminder of the potential of a united Opposition, and most importantly, a reprieve for a proper conversation over the Constitution.

The introduction of the Bill had all the hallmarks of the BJP's governing style. This was yet another attempt to further a sense of what this column had described as a permanent revolution. The governing style of permanent revolution is to destroy the power of all countervailing institutions, break all restraints, and consolidate executive power. The manner of introducing this Bill signified this. A far-reaching constitutional amendment, which would have deep implications for all constitutional bodies, the power of the Rajya Sabha, the constitutional status of the delimitation process, the transformation of federalism, and the character of the Lok Sabha, was introduced in a throw-away manner. It duplicitously linked delimitation and women's reservation. The second feature of the permanent revolution is wresting personal ownership and credit for issues on which there is a wider political consensus.

The one constant feature of Narendra Modi's career as Prime Minister is that he has politically weaponised the issues of gender and sought to claim the moral and political high ground on those issues. In some areas of welfare and legal reform, these have yielded dividends. But these have also been accompanied by the normalisation of mis-

ogyny by the BJP. But these contradictions don't matter to the permanent revolution. It wants to own every issue and use it as a weapon when needed.

The third hallmark of the permanent revolution is the constant need for mobilisation, in victory or defeat. In this case, as in so many others, a combination of hubris and unpreparedness led to defeat. But we also know in the past, for instance, in the moment of demonetisation, they can even turn hubris and incompetence into a rallying cry for mobilisation. One of the challenges for the Opposition is going to be to prevent the BJP from doing what it does best — play the aggrieved and hurt party, which casts the Opposition as obstructionist. And the final feature of the permanent revolution is institutional price discovery. Keep pushing the boundaries of what we think is possible within the current constitutional framework and see what you can get away with.

Indeed, the most sinister aspect of this moment is how much the BJP's experiments in Assam and Bengal, with delimitation and the SIR, respectively, were part of this template. They have created a precedent for how much havoc can be caused to voters through different forms of institutional gerrymandering. In Bengal, it may backfire politically. But these are attempts to experiment with and acquire instruments that could be used to shape, control and manipulate elections. Like demonetisation, they impose the greatest cost on the poorest of citizens in the name of abstract national inter-



PRATAP BHANU MEHTA

est: Tens of thousands having to rush to their home states from long distances to preserve their citizenship status. The courts did not put a stop to some of these measures. It is some relief that at least the Opposition was able to show the BJP that there are still limits to the project of permanent revolution.

This defeat allows a more sober reconsideration of important institutional and constitutional questions. But it has to be said, our constitutional discussion seems to be producing anomaly upon anomaly, and not facing up to the internal tensions that arise out of the way we think of representation. For years, political parties have been trying to find pretexts for avoiding implementing their own commitments on reservation. This may be yet one more attempt to complicate matters. But the constitutional anomaly of trying to produce semi-proportional outcomes from a first-past-the-post system and the deepening of the rotation of reserved constituencies does put a strain on other principles of representation, including the rights of voters not to have their choices restricted by the identity of the candidate.

Other ways of achieving this objective that would have displayed a more consistent logic — multi-member districts or party lists — were summarily thrown out. The anomaly of accepting the principle of caste reservation in one part of the political system while denying it in another, the tension between federal balance and the principle of the equal value of the vote, are all complex issues. The

integrity of the delimitation process needs to be protected at all costs. They need to be dealt with by building consensus.

On balance, given India's history and sensitivities, the federalism question and the balance of power between the Centre and the states have to be dealt with through consensus. But even here, three things have to be said. First, while linguistic imposition must be resisted and regional fairness in representation ensured, reducing the debate to regional antagonism risks legitimising the very ugly politics we ought to resist. The cultural trope of north versus south is dangerous and analytically unfounded. Second, at least on constitutional issues, considerations cannot be governed by which political party benefits in the short run. We need more principled arguments. And third, at all levels of government — state legislatures, panchayats, urban local bodies, Parliament's functioning and procedures — we need to take a long, hard look at what form a genuine representative process should take.

The Opposition has won an opening. But if it is to continue the momentum on behalf of democracy, it will have to go into constant mobilisation and convince citizens that it stands for genuine democratic empowerment and institutional integrity. Discussions of democracy and institutions must now be rescued from the taint of opportunism and bad faith. The permanent revolution has been thwarted. But democracy is still in peril.

The writer is contributing editor, The Indian Express

Our constitutional discussion seems to be producing anomaly upon anomaly, and not facing up to the internal tensions that arise out of the way we think of representation

**Context** The article argues that the defeat of the 131st Constitutional Amendment Bill, 2026, is not just a government setback but a chance to reopen a serious debate on democracy, federalism, representation and constitutional limits.

## Theoretical Lens

Permanent Revolution → Governance style is to destroy the power of countervailing institutions & consolidate executive power.

- The second feature is wresting personal ownership and credit.
- The third hallmark is the constant need for mobilisation, in victory or defeat.
- The final feature is institutional price discovery.

## Facts

- The Bill linked delimitation with women's reservation.
- Assam delimitation & Bengal SIR are precedents of possible constitutional gerrymandering.

## Analytical Crux

The defeat of the Bill matters because it checks a larger pattern of executive overreach. The author's main warning is that delimitation, reservation and federal balance cannot be handled through political shortcuts or hurried constitutional engineering. These questions need broad consensus because representation, fairness and federalism do not fit easily within the present electoral system. The article also warns against reducing the debate to a North-South battle or a short-term party contest. Democracy will remain safe only if institutions, procedure and constitutional restraint are defended continuously.

## Verbatim Quotes

"The defeat of the Constitution (131st Amendment) Bill 2026, is an embarrassment for the government, a reminder of the potential of a unified opposition and most importantly, a reprieve for a proper conversation over the constitution."

"The integrity of delimitation process needs to be protected at all costs."  
— Pratap Bhanu Mehta

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