

PSIR & GS-2

DAILY BRIEF

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Hormuz holds key to peace in expanding war



Hormuz holds key to peace in expanding war

Tehran's control of the strategic chokepoint outweighs Washington's stop-start military pressure



R Swaminathan

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Context

US's threaten-and-retreat cycle has run out of road and that reopening the Strait of Hormuz - on terms that accept Iran's control of it - is now the only realistic route back to peace.

Facts

Trump has halted planned military strikes against Iran on 6 distinct occasions since the war began.

Iran's embargo has neutralised Saudi's East-West pipeline plan to bypass Hormuz, forcing it to sail around Africa.

Iran has announced a tentative agreement with Oman on a bilateral transit corridor, but says maritime security is impossible until the US lifts the naval blockade.

Analytical Crux

Six months of bombing have bought US nothing that matters: it cannot invade, its precision munitions are running low, and every threatened strike ends in retreat once Gulf capitals plead for their refineries and desalination plants. Iran has quietly converted geography into the decisive weapon - by holding Hormuz shut & stretching the war through the Houthis & Iraqi militias, it has made Gulf energy hostage everywhere, not just inside the strait. This is why the real question has shifted from whether Iran controls Hormuz to how that control gets regularised and the Oman corridor is the first draft of that answer.

Verbatim Quotes

"Resolving the Hormuz deadlock offers the only plausible path for USA & Iran to resume negotiations on nuclear and other issues."

- R. Swaminathan

A new security triangle emerges with the Makkah pact

A new security triangle emerges with the Makkah Pact

The Makkah Joint Defence Agreement (MJDA), signed on August 7, 2026, by the top leaders of Saudi Arabia, Türkiye and Pakistan, is the first regional realignment since the geostrategic tsunami of the United States-Iran war. While the MJDA text has not been revealed, the joint statement issued specifically states that “any armed attack against any one of the three states shall be regarded as an attack against them all”.

This echoes infamous Article 5 of the North Atlantic Treaty Organization (NATO) – never invoked – leading speculators to claim that the MJDA was a harbinger of a “Muslim NATO”. It appears to be part of a jerky Saudi response to specific security challenges, including a Strategic Mutual Defence Agreement (SMDA) with Pakistan last year and a 14-country Multinational Maritime Defence Alliance (MMDA) in the last week of July.

Shifting alignments, uncertain stakes

Any analysis of the MJDA faces multiple uncertainties, including ongoing regional turbulence, partners’ previous karma, and their varied expectations. This hazy context creates a push-pull effect: from anticipation of the MJDA having profound cascading implications to it being a seemingly desultory, inconsequential response to their asymmetric defence and security challenges. Some also see it as inducing counter-polarisation and alarming other stakeholders from Iran and its non-state allies, Israel, Kurds, and Greece to the United Arab Emirates and India. To walk back, the Saudi Deputy Foreign Minister has clarified that it is neither an effort to establish a military axis nor a sectarian bloc. He denied any link to nuclear ambitions or an arms race.

This denial is unlikely to pierce the statement’s conspicuous silence about the precise threats that the MJDA is geared to confront, the U.S.-Iran war rolling the region, Israeli aggressiveness, threats from the non-state actors, and the impact of choke point constrictions. It also refrains from either inviting like-minded regional powers to join in or an uplink with the existing collective security architectures provided by the Arab League, the Organisation of Islamic Cooperation and the Gulf Cooperation Council (GCC).

Observers point out that the Arab-Muslim world has remained divided against Israel for close to eight decades. Hence, the prospect of the MJDA being a precursor to a Muslim NATO polarised against Iran and its Arab proxies appears far-fetched at this stage. Moreover, even as all three MJDA signatories are allies of the U.S. (which remains suspiciously silent), it is unclear if it is meant to substitute the regional Pax Americana or to serve as a surrogate for the *ancien régime*. In the same vein, if the proposed Muslim NATO in future decides to confront Israel, the U.S. would have scored its own goal.

Moreover, the MJDA is beset by various snags. The Saudis have bitter memories of the Ottoman



Mahesh Sachdev
Retired Indian Ambassador, specialising in the Arab world and oil issues

rule, which brutally suppressed the Al-Saud. For similar reasons, from Türkiye, Ankara’s boots on the ground have been shunned by most post-independence Arab regimes.

Till recently, Türkiye promoted the Sunni outfits such as the Muslim Brotherhood, Hamas and motley Syrian militias, many of which are anathema to the Gulf regimes. Türkiye’s President Recep Tayyip Erdoğan’s Neo-Ottoman ambitions to lead the Sunni Islamic world collide with the Kingdom’s self-image of being the Custodian of Islam’s Two Holiest Shrines. Riyadh does not contenance playing second fiddle to Turkey or any other Muslim power. President Erdoğan had a testy relationship with Saudi Crown Prince Mohammed bin Salman (MbS) over the 2018 murder of Jamal Khashoggi, a U.S.-based Saudi journalist, in the Saudi consulate in Istanbul. Turkish leaks on this episode sullied MbS’s image, making him a western outlier.

On the other hand, Pakistani troop deployments in Saudi Arabia in the past resulted in frictions due to chain of command disputes, Islamabad’s refusal to have its troops shorn of Shias and its reluctance to confront Iran or Yemen. Armed forces in Türkiye and Pakistan have a long-standing tradition of Bonapartism. Saudis have kept armed forces and the National Guard, both with an American-styled set up, out of politics since the Ikhwan militia insurrection (the late 1920s) and the Makkah siege of 1979. Both Türkiye and Pakistan have an active border with Iran – offering a potentially lucrative post-war economic bonanza that they would be loath to forego. Pakistan’s enthusiasm for the MJDA is circumscribed by its 900 kilometre-long border with Iran, a large Shia minority, internal security challenges and hostility with India and Afghanistan. In a typical doublespeak, last week, Pakistan began formal discussions on a Free Trade Agreement with Iran, notwithstanding the U.S. sanctions, the MJDA and the SMDA.

Riyadh’s security needs

The MJDA is clearly fulcrumed around Saudi security requirements, which Riyadh expects Türkiye and Pakistan to mitigate as part of a “friends with benefits” arrangement. However, the current threats faced by Saudi Arabia are complex and asymmetric, ranging from air attacks on its vital and vulnerable oil and civil infrastructure by Iran and its proxies, the closures of the Strait of Hormuz and Bab al-Mandeb and the possible insurrection by the restive Shia minority. It is unclear if Türkiye and Pakistan can meet such challenges, where the U.S. Central Command, with its large, long-standing presence and state-of-the-art equipment, failed. The new allies could perhaps upstage the U.S. in having more boots on the ground in Saudi Arabia, but the Kingdom is unlikely to face a ground invasion. Moreover, relying on foreign forces to address internal security challenges would be bad optics for the

Kingdom. The foregoing is not to deride the MJDA as merely a cosmetic exercise. It symbolises the congruence of the three large Sunni powers with considerable complementarity: the Saudi \$83 billion defence budget, Türkiye’s booming military industrial complex exporting \$10 billion annually and Pakistan’s 6,60,000-strong armed forces. Their defence and security cross-pollination through military exercises, interoperability of weapon systems and co-production and development of hardware would be beneficial to them all. Additionally, Türkiye and Pakistan could gain political influence in the Kingdom and enrich themselves.

At this stage, the MJDA’s future appears uncertain. It may flourish if a low-burn attrition war continues to ripple through the region. Ironically, if an all-out shooting war breaks out, Türkiye and Pakistan may be hesitant to commit forces against Iran, their neighbour. At the other end, if peace prevails, the MJDA would become superfluous. A market share scrimmage among the oil exporters would create a glut, affecting the Saudi capacity to bankroll the MJDA partners.

Having suffered Iranian doggedness and Trumpian tantrums, Saudi Arabia and other Gulf Arabs are currently experimenting with various security alternatives. The Saudis began the SMDA with Pakistan last year and have felt the need for an MMDA and MJDA. They do not appear to be playing a zero-sum game between semi-reliable Pakistan and India. U.S. President Donald Trump’s unreliability was on full display to the Saudis recently in his last-minute Abraham Accords rider to the recent nuclear agreement with the Kingdom. The Saudis may not wish to further complicate their dependence on Uncle Sam by deepening their entanglement with Ankara and Islamabad, both ultimately subject to Washington’s dictates.

The implications for India

Depending on various scenarios panning out, the MJDA can impact India’s interests in multiple ways. While India needs to keep a steely eye on Pakistan’s attempt to align the MJDA partners with it against India, New Delhi should not overreact. As the world’s third-largest crude oil importer, India is slated to drive global demand for the next 15 years. India has been the Kingdom’s third-largest market and second largest trading partner. Like Saudi Arabia, India has been both a consistent and moderate pro-status quo power amenable to simpler paradigms of economic complementarity.

Riyadh finds ties with India uncluttered by extraneous considerations. India is a geo-strategically safe bet for the turbulent Gulf. Riyadh, facing a huge paradigm shift, is most unlikely to wade into supporting Pakistan’s adventurism against India. So, while the MJDA may give Islamabad an adrenaline high, Pakistan’s quest to match India’s rise through military fluster in West Asia is unlikely to succeed.

Real Creator IAS Edition <https://whatsapp.com/channel/0029VanZVRb6RGfOKH6oBd8F>

Context The new Saudi-Turkiye-Pakistan defence pact is a “Muslim NATO” in the making or just an anxious Saudi security shopping, and what either answer means for India.

Facts

Pakistan has a 900 Km border with Iran and a large Shia minority & began Free Trade agreement discussions with Iran the same week, despite US sanctions, the MJDA & SDMA.

India is the world’s third largest crude importer & slated to drive global demand for the next 15 years; it is Saudi’s 2nd largest trading partner.

Analytical Crux

Read the MJDA not as a "Muslim NATO" but as the third layer of Saudi hedging in one year ; SMDA, then the maritime MMDA, now this bought by a Kingdom that trusts neither US protection nor Iranian restraint. Its Article 5-style clause is hollowed out by everything the text refuses to say : no named threat, no link to the GCC, OIC or Arab League, no invitation to anyone else. Structurally the pact works only in a low-burn war : all out war makes partners hesitate to fight their neighbour, and peace makes it superfluous. For India, the correct posture is watchfulness without overreaction - Riyadh's economic stakes in India are too large to underwrite Pakistani adventurism.

Verbatim Quotes

"Riyadh find ties with India uncluttered by extraneous contradictions. India is a geo-strategically safe bet for the turbulent Gulf."

— Mahesh Sachdev

EC's real test - Winning the confidence of the opposition

EC's real test: Winning the confidence of the Opposition

BARELY TWO weeks after the publication of my memoir *India and I*, interviewers and readers have repeatedly asked why I believed the Opposition deserved preferential treatment by the Election Commission (EC).

The answer lies at the heart of what I believe is the constitutional philosophy of election management: The ruling party needs regulation. The Opposition needs reassurance. The EC must provide both.

The framers of our Constitution deliberately placed the EC beyond the reach of the executive. Elections could not command public confidence if the referee was perceived to be close to one of the contestants, especially the ruling party. The Commission was therefore created as an independent constitutional authority, entrusted with protecting the integrity of the electoral process. That independence is not merely legal; it is institutional.

A serving civil servant appointed as Election Commissioner relinquishes his service and assumes a constitutional office. In my case, I resigned from the Indian Administrative Service a year before retirement. That separation reflects a profound constitutional principle. Once appointed, an Election Commissioner no longer serves the government of the day. His allegiance belongs exclusively to the Constitution.

The Supreme Court has repeatedly reaffirmed this constitutional vision. In *TN Seshan v. Union of India* and, more recently, in *Anoop Baranwal v. Union of India*, it underscored that an independent EC is indispensable to free and fair elections, which form part of the Constitution's basic structure.

But constitutional independence cannot be measured only by legal safeguards. It must also be reflected in institutional behaviour. The EC must consciously maintain an arm's-length relationship with the executive.

Real Creator IAS Edition <https://whatsapp.com/channel/0029Van2VRb6RGJOKH6oBd0F>

Any perception of a cosy relationship between the executive and the EC is antithetical to the constitutional scheme and corrosive of public confidence.

That constitutional distance has an important implication. The party in power commands the administrative machinery, public visibility and official resources. The Opposition has only its voice and its confidence that an impartial constitutional authority will hear it fairly.

Recognising this asymmetry does not compromise neutrality. It fulfils it.

When I became Chief Election Commissioner, I gave my officers a simple instruction. If Opposition parties sought an appointment, they should receive one at the earliest. Sometimes requests came with barely 15 minutes' notice. We did our best to accommodate them. Not because they deserved favours, but because they were entitled to confidence that they would always receive a patient hearing.

An EC trusted only by the ruling party has failed just as surely as one trusted only by the Opposition. It must command the confidence of both. But the confidence of the Opposition is often the more exacting test because those without power are naturally more anxious about the fairness of the referee.

One incident from the Bihar Assembly election of 2010 illustrates why.

Around 11 o'clock on the eve of counting, Lalu Prasad Yadav telephoned me with an unusual request. He wanted only bank employees to supervise counting in his constituency. Although all arrangements had been finalised, I asked the Chief Electoral Officer to accommodate the request, come what may.

The following evening, after he had lost, he telephoned again. This time he appeared inclined to



S Y QURAISHI

question the Electronic Voting Machines. I told him candidly that people would laugh if he did so. He accepted the advice. A modest accommodation had preserved something far more valuable than administrative convenience. It had preserved confidence in the electoral process.

Throughout my tenure, the Bharatiya Janata Party sat in the Opposition. Its leaders frequently approached the Commission with complaints and representations. They received the same patient hearing. Arun Jaitley initially viewed me with some reservation, but that disappeared as he experienced the Commission's even-handedness. Years later, he generously described me as "one of India's most mature and credible Chief Election Commissioners." I treasured those words because they reflected confidence earned through institutional fairness rather than personal friendship.

The philosophy I followed was not an individual innovation. It is reflected in India's own Model Code of Conduct (MCC). Significantly, one of its most important chapters is devoted to the "Party in Power". It restrains ministers from using official machinery for campaigning, prohibits the misuse of public resources and bars policy announcements that may influence voters. The constitutional instinct is unmistakable: Those who wield power require greater restraint because they already possess overwhelming advantages.

One of India's greatest democratic achievements has been the extraordinary legitimacy of its electoral verdicts. Governments changed. Prime Ministers lost office. Powerful Chief Ministers were voted out. Candidates gracefully accepted the verdict and began preparing for the next election. This confidence in the process made our elections a model for emerging

democracies.

It is precisely because that reputation is so precious that recent developments should concern us all. During the 2024 general election, Opposition parties repeatedly complained that their representations alleging violations of the MCC were not receiving prompt and transparent consideration. Even Election Commissioner Ashok Lavasa protested, for which he was hounded out. More recently, 23 Opposition parties took the extraordinary step of writing to the Chief Justice of India expressing serious concerns about the EC's handling of the Special Intensive Revision of electoral rolls. Around the same time, the Trinamool Congress publicly alleged discourtesy in its interaction with the Commission, an allegation firmly denied by the Commission.

Whether these grievances are ultimately upheld is not the central issue. The deeper concern is that a significant section of the political spectrum felt compelled to seek relief from another constitutional institution rather than the EC itself. No EC should ever allow such a perception to develop.

In my experience, most defeated candidates can accept defeat. What they find difficult to accept is the feeling that nobody listened to them before they lost.

Every EC is judged twice: First by how efficiently it conducts elections, and then by the confidence it inspires among those who lose them. The first test is statistical. The second

is constitutional

Quraishi is former chief Election Commissioner of India and the author of India and I – A Hundred Memories, Not a Memoir

Context Election Commission's

constitutional duty is

asymmetric by design and

today's EC is failing the

harder half of that test.

Facts

The framers deliberately placed the EC beyond executive's reach as an independent constitutional authority protecting integrity of elections.

In *T. N. Seshan vs. Union of India*, the Supreme Court held an independent EC indispensable to free & fair elections, which form part of basic structure.

Analytical Crux

The central claim is that EC neutrality is asymmetric by design: the ruling party already commands the state machinery, so treating both sides "equally" actually favours power. That is why the MCC's most important chapter regulates the Party in Power, while the Commission's daily conduct must - reassure the opposition - recognising the asymmetry does not compromise neutrality, it fulfils it. Independence here is behavioural, not merely legal: arm's length distance from the executive, instant hearings, small accommodations that buy large legitimacy. The health test of the referee is the loser's confidence - and when two dozen parties bypass the EC for the CTI, that test is being failed.

Verbatim Quotes

"Most defeated candidates can accept defeat. What they find difficult to accept is the feeling that nobody listened to them before they lost."

- SY Quraishi

- **GS-2 2025 (15m):** "Energy security constitutes the dominant kingpin of India's foreign policy, and is linked with India's overarching influence in Middle Eastern countries." How would you integrate energy security with India's foreign policy trajectories in the coming years?
- **PSIR 2023, Paper II (15m):** What are the challenges and limitations in India-Iran relations?
- **PSIR 2024, Paper II (15m):** Do you agree with the view that the USA uses NATO as a traditional tool of strategy to perpetuate its hegemony in the world?
- **PSIR 2025, Paper II (10m):** Would you agree with the contention that India's inclination to lean on a 'more aggressive hyper-realist posture' has gained a new momentum in the aftermath of the Pahalgam terrorist strike?
- **PSIR 2025, Paper I (15m):** There is a debate on the procedure for appointment of the Chief Election Commissioner and Election Commissioners to the Election Commission of India. Analyse its various aspects.
- **GS-2 2025, (10m):** Discuss the 'corrupt practices' for the purpose of the Representation of the People Act, 1951.



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