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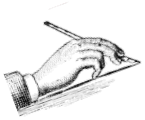

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GS 2: INTERNATIONAL RELATIONS
INDIAN EXPRESS PAGE: 13

Israel, US strike Iran: Impact on oil, energy flow via Strait of Hormuz

Sukalp Sharma
New Delhi, February 28

REUTERS FILE

WITH ISRAEL and the US launching military strikes in Iran on Saturday, and Tehran reportedly moving to block the Strait of Hormuz — even as there has been no formal announcement — the global oil market is expected to see significant volatility, much of which will be contingent on how the conflict shapes up.

On Friday, oil prices hit a seven-month high as indirect talks between the US and Iran dragged on without a breakthrough amid growing US military presence in the region. With Saturday morning's strikes across Iran marking a major escalation in the conflict, the war premium in oil prices could jump when markets open after the weekend break.

From softening in the event of a US-Iran deal to reaching triple digits in the worst-case scenario of a regional conflict and oil flow disruption, nothing seems off the table when it comes to oil prices in the current circumstances.

For India, one of the top oil importers globally, higher oil prices are never good news. Given India imports around 2 billion barrels of oil annually, every $1 increase in oil prices could increase the country's hefty oil import bill by around $2 billion on an annualised basis. The reason why oil markets appeared jittery was the apprehension that the row could choke oil supplies from the wider Gulf region, which accounts for the lion's share in global oil exports. And on late Saturday evening, the fears came true. Iran reportedly blocked the Strait of Hormuz — a narrow but vital waterway that is a critical chokepoint for global oil and gas flows.

The global oil market is well-supplied with enough surplus, which emboldened the Trump administration as it evidently expects minimal impact of strikes on Iran on oil prices. The situation, however, could turn on its head in case of an extended blockade of the Strait and the conflict spilling over to the wider region.

In addition to Iran, other major Gulf oil producers like Saudi Arabia, Iraq, and the UAE, are heavily dependent on the Strait to feed the global market. Therefore, despite their often-strained relationships with Tehran, some of the Gulf nations had been actively engaging with the US administration to prevent military intervention. As tensions between Washington and Tehran refused to die down and the risk of possible US military strikes and regional conflict became increasingly credible, benchmark Brent crude prices ended the week well over $72 per barrel, the highest since late July last year.

Oil flows via the strait

Described by the US Energy Information Administration as the world's most important oil transit chokepoint, the Strait of Hormuz — the narrow waterway between Iran and Oman that connects the Persian Gulf with the Gulf of Oman and the Arabian Sea — handles approximately one-fifth of global liquid petroleum consumption and global LNG trade. Roughly 15 million barrels of crude and 20% of global LNG volumes pass through the Strait every day. While some pipelines exist in the gulf states to bypass the waterway, their capacity is restricted. Even at full utilisation, 9 million barrels per day (bpd)—9% of global demand—would remain structurally at risk during a major escalation, according to industry experts. As per tanker data, over 40% of crude oil imported by India transits the Strait of Hormuz. The importance of the chokepoint for India's energy supply and security cannot be understated as the country is the world's third-largest consumer of crude oil and depends on imports to meet over 88% of its requirement. Iran has, time and again, threatened a blockade of the Strait and strikes against tankers transiting it. There is also the lurking threat of strikes by Iran's proxies in Yemen against tankers transiting the Bab el-Mandeb, another important maritime chokepoint that connects the Red Sea to the Gulf of Aden and the Arabian Sea. It is a critical artery for global energy flows transiting the Suez Canal.

What happens after the blockade

Analysts believe a full blockade would be politically self-destructive for Tehran as the move could alienate key allies like China, which is the destination for most of Iran's own oil. A blockade would also infringe upon Oman's territorial waters, souring relations with a neighbour that serves as a vital back-channel for diplomacy with the US.

The US is interpreting previous confrontations — where military actions did not cause oil prices to spike — to reinforce its current assumptions that a conflict with Iran will be similarly low-risk.

Such views are also based on the US's own high oil production levels and Washington's belief that West Asian heavyweights like Saudi Arabia — the world's largest oil exporter — can quickly recover from any disruption to keep the global oil market well-supplied, according to experts.

"But I worry Washington is lulling itself into a false sense of security. The risk is that US officials might misread Tehran's risk tolerance to respond far more forcefully to any American attack than it did in the past. If the Islamic Republic feels its survival is at stake, the regional energy industry could become a target. By interpreting past confrontations in ways that reinforce their own current assumptions, US officials risk missing important alternative scenarios," *Bloomberg Opinion* columnist Javier Blas wrote in a column on the issue.

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From Iraq in 2003 to Iran in 2025-2026: Why US has chosen to play second fiddle to Israel despite progress on Iranian n-talks

Anil Sasi
February 28

IRAN WOKE up this morning at war with Israel for the second time in less than a year. This also marked at least the third time in the last two-and-a-half decades that the United States has been prodded on to join a skirmish in west Asia, presumably on the coaxing of Israel.

The 2003 America-led invasion of Iraq was predicated on claims that Saddam Hussein possessed Weapons of Mass Destruction (WMDs), though none were found later.

Israel is cited by multiple Washington DC insiders as having strongly pushed the US to invade Iraq, while much of Israeli intelligence allegedly knew Iraq no longer had the capabilities to assemble WMDs.

Progress on new deal

The military offensive in Iran now comes despite credible progress having been made by US and Iranian officials in the high-stakes nuclear talks that wrapped up earlier this week in Geneva.

Oman's foreign minister Badr Albusaidi, who was mediating between the two sides, said the draft agreement involved Iran expressing willingness to furnish an undertaking of some sort that it would not have in its possession nuclear material that could be used to fabricate a bomb.

That, Albusaidi said on CBS News, was something that was not in the old deal negotiated during former President Barack Obama's time and marked a completely new concession from the Iranian side.

That really rendered the enrichment argument against Iran irrelevant, because zero stockpiling was now on the table.

He also said part of breakthrough was that Iran would give up its existing stockpile of enriched material, "down blended and restricted from enrichment", while expressing confidence that Tehran will also allow in inspectors to look at its nuclear sites, including possibly the Americans.

The problem for President Donald Trump was that offering major sanctions relief to Iran could have been seen as him having chickened out, given that he has ordered the largest US military build-up in West Asia since the 2003 invasion of Iraq, while Iran had vowed to respond to an attack with force.

Trump was also the one who jettisoned the deal inked during President Obama's time, and going back to something broadly similar after nearly a decade would have been construed as a defeat of sorts.

For the better part of the last two decades, the US and Israel have accused Iran of trying to secretly develop a nuclear weapon, something that Tehran has repeatedly denied.

Iran has said its programme is only for peaceful purposes, though the country is the only non-nuclear-armed state to have stockpiles of enriched uranium at near weapons-grade levels.

Iranian state media quoted by the BBC said its negotiators insisted that Tehran had the right to peaceful nuclear energy and rejected US demands to completely stop the enrichment of uranium in Iranian territory and to transfer its stockpiles of an estimated 400kg of enriched uranium out of the country.

But the Iranians are believed to have offered concessions in the latest talks, as attested to by Oman's foreign minister, even though the proposals have not been made public. One of the reported options was for Iran to be allowed to enrich uranium at a minimal level after a three-to-five-year suspension, under international monitoring. In return for a deal, Iranian foreign minister Abbas Araghchi told Iranian television that the negotiators sought the lifting of sanctions that have debilitated Iran's economy.

Iran had earlier turned down discussing limits to the country's ballistic missile programme and ending support for its proxies in the region, including Hamas in Gaza, Hezbollah in Lebanon, and the Houthis in Yemen. The American government considers Iran to be the biggest state sponsor of terrorism, spending more than one billion dollars on terrorist financing annually.

Iran's n-programme

According to New York-based think tank Council on Foreign Relations (CFR), Iran has pursued a nuclear programme since at least 1957, with varying degrees of success. During a war with Iraq, Iran decided to develop nuclear weapons to ensure its security in the late 1980s.

Consequently, Iran pursued agreements with China and Russia to support the program's research throughout the 1990s.

In early 2002, the National Council of Resistance of Iran, an umbrella organisation made up of Iranian dissident groups, exposed the existence of two Iranian nuclear sites that were presumably hidden from the IAEA.

By 2003, diplomats launched an intensive effort to stop Iran's nuclear programme. Iran agreed, insisting only on keeping its centrifuges for nuclear energy.

However, it did not follow through on its commitment to transparent reporting to the IAEA and continued covert activities, leading to a June 2004 rebuke and a September 2005 finding of non-compliance by the IAEA, paving the way for a future referral to the UN Security Council (UNSC).

In 2006, the UNSC adopted Resolution 1696, the first legally binding call for Iran to suspend its uranium enrichment program, the CFR noted. Over the next few years, the UNSC adopted a series of resolutions "imposing crippling economic sanctions on Iran for its failure to suspend its enrichment-related activities".

Between 2011 and 2015, the compounding effects of international sanctions led Iran's economy to contract by 20% and unemployment to rise to 20%, the CFR report noted. In 2013, Hassan Rouhani, a moderate, won Iran's presidential election, campaigning on a promise to lift sanctions and restore the economy.

Over the next two years, the US convened several rounds of bilateral talks and led the other P5+1 coalition members—China, France, Germany, Russia, and the United Kingdom—in negotiations with Iran's new leadership.

These efforts culminated in the adoption of the Joint Comprehensive Plan of Action (JCPOA) that was spearheaded by President Obama in 2015. Once key parties signed the agreement, the UNSC approved UN Resolution 2231, paving the way for sanctions relief.

Because the JCPOA only addressed Iran's nuclear programme, and not its ballistic missile programmes, the first Trump administration withdrew the US from the agreement, pledging to seek a more comprehensive deal.

In 2018, the Trump administration began reimposing sanctions on Iran and demanded that European countries withdraw from the JCPOA as part of a new containment strategy.

• Iran's Nuclear Programme: Key Dates

1957: Iran pursues a nuclear programme for the first time

LATE 1980S: During war with Iraq, Iran decides to develop nuclear weapons to ensure its security

1990S Iran pursues agreements with China and Russia to support nuclear research

EARLY 2002: National Council of Resistance of Iran exposes existence of two hidden Iranian nuclear sites

2003: Diplomats launch intensive effort to stop Iran's programme; Iran agrees to keep centrifuges only for energy

2004: IAEA rebukes Iran for failing to commit to transparent reporting

2005: IAEA finds Iran in non-compliance, paving way for UNSC referral

2006: UNSC adopts Resolution 1696, first legally binding call for Iran to suspend uranium enrichment

2006–201: UNSC adopts series of resolutions imposing crippling economic sanctions on Iran

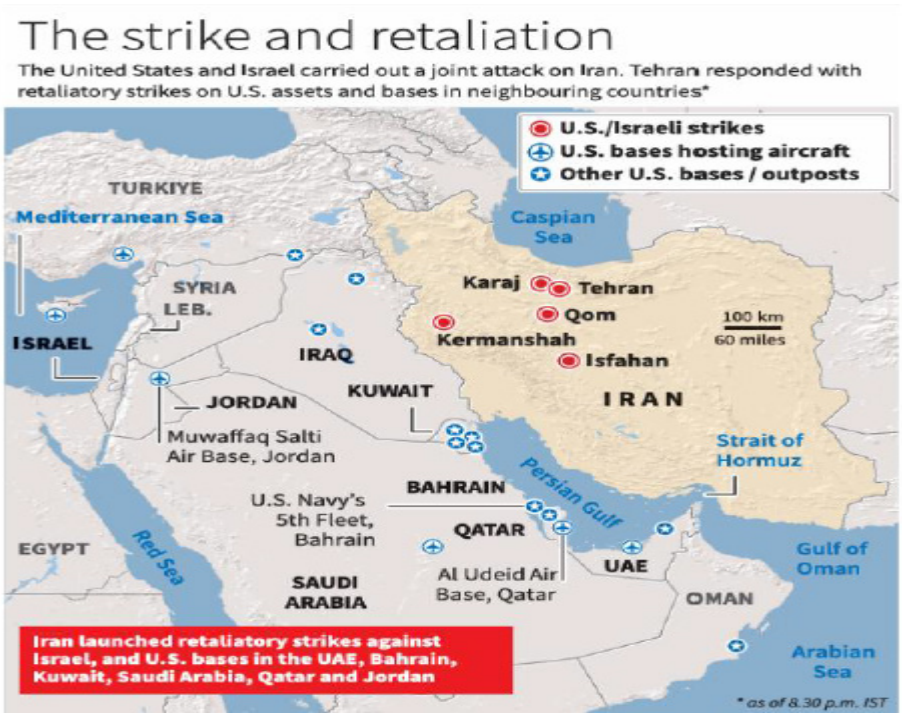
2011–2015: International sanctions cause Iran's economy to contract by 20%; unemployment rises to 20%

2013: Hassan Rouhani wins presidency on promise to lift sanctions and restore economy

2015: Joint Comprehensive Plan of Action spearheaded by President Obama; UNSC approves Resolution 2231

2018: First Trump administration withdraws US from JCPOA, begins reimposing sanctions

FEBRUARY 2026: US and Iranian officials hold high-stakes nuclear talks in Geneva; progress reported on new concession.



GS 2: HEALTH
THE HINDU PAGE: 5

On this Rare Diseases Day, unspent budget and untreated patients remain a concern

Ramya Kannan
CHENNAI

Nayan was diagnosed with MPS 2, a rare genetic disorder, in 2016. His growth became stunted, and despite his best efforts to stay active and exercise, the disease does not let him live a normal life. "We had requested ₹1.25 crore from the government but got only ₹50 lakh from the Prime Minister's Office. That is less than half the amount we need to help Nayan live a normal life," says Jagdish Papnai, his father.

Alishba Khan, also from Delhi, is in a similar circumstance. Her father, Maqsood Alam, says the seven-year-old with Gaucher disease had begun to stabilise with treatment, thanks to the financial aid of ₹50 lakh given through

According to an RTI reply, the NPRD utilised only ₹30.79 crore of the ₹299 crore allocated for rare disease treatment. GETTY IMAGES

the National Policy for Rare Diseases (NPRD). When the funding ceiling was crossed in August 2024, Alishba's treatment stopped; since then, her condition has deteriorated, and even breathing has become difficult, he said.

On Rare Diseases Day, there is a strange sort of crisis in India. A notified policy for rare diseases is in place, there are Centres of Excellence (CoEs) established across the country, and a robust budget to assist with treatment.

However, about ₹271 crore allocated for rare disease patients remains unused, and many of the children are quietly but steadily losing their quality of life and hope.

A few children have already died waiting for a resolution. "With the Supreme Court hearing scheduled for March, patients are caught in limbo. We are witnessing the devastating reality of treatment interruptions. Every delay in restarting and sustaining therapy has life-altering consequences. We need immediate intervention to ensure continuity of care," says Saurabh Singh, founder of the Rare Disease India Foundation.

The rare diseases community, which has gained a voice over the years, points out that the current situation is completely untenable, particularly because the money actually exists. For the year 2025-26, ₹299 crore was allocated for rare disease treatment, but as per a reply to an RTI application by Manjit Singh, president of the Lysosomal Storage Disorders Society, only ₹30.79 crore has been utilised by the NPRD so far.

Care halted

"Nearly 2,000 rare disease patients across India are currently awaiting treatment, including around 450 eligible patients with life-threatening Lysosomal Storage Disorders (LSD). Alarmingly, approximately 100 children who had begun treatment have already exhausted the ₹50-lakh funding cap and now face a complete halt in life-saving care, pushing them back to square one. Eight patients have already died while waiting for treatment support," Mr. Singh explained.

GS 3: FOOD SECURITY
THE HINDU PAGE: 5

Centre suspends rice fortification scheme; activists back move

The Hindu Bureau
NEW DELHI

As the Union Food Ministry decided to temporarily discontinue the process of rice fortification "until a more effective mechanism for delivery of nutrients to beneficiaries is identified", activists who had challenged the scheme in the Supreme Court have welcomed the move, and said fortification is not a scientific method to curb anaemia.

On Friday, the government announced that it had reviewed the implementation of rice fortification under the Pradhan Mantri Garib Kalyan Anna Yojana (PMGKAY) and other welfare schemes. "Based on this review, it has been decided to temporarily discontinue the process of rice fortification under PMGKAY and allied schemes until a more effective mechanism for delivery of nutrients to beneficiaries is identified," the Food Ministry said, citing a study by the IIT, Kharagpur to assess the shelf life of fortified rice kernels and fortified rice under actual storage conditions in diverse agro climatic zones in the country.

"The report concludes that factors such as moisture content, storage conditions, temperature, relative humidity, and packaging material critically influence their stability and shelf life. They are susceptible to micronutrient reduction and shortening of shelf life during prolonged storage and routine handling. This reduction is rendering the effective shelf life shorter than expected and, in turn, limiting the intended nutritional outcomes," the release added. The government maintained that the decision does not entail any reduction in foodgrain entitlements and will not affect operations under the public distribution system.

Activists say rice fortification is not a scientific method to curb anaemia. REUTERS

Social activist Kavitha Kuruganti said rice fortification is an expensive and ineffective intervention, which is unsafe and toxic. "While the government is citing a study to stop this large-scale fortification, we had shown much evidence that not all anaemia is linked to iron deficiency, nor is fortification an effective solution," she said.

GS 3: ECONOMY
THE HINDU PAGE: 10

Brazil help India?

Why is India trying to build capacity at home across the rare earths and critical minerals value chain?

Vasudevan Mukunth

The story so far:

India and Brazil signed a memorandum of understanding (MoU) on rare earths and critical minerals during President Lula da Silva's state visit to India on February 21. The joint statement said the two countries want to work together across the full mineral "value chain" and that the understanding includes exploration, mining, processing, recycling, and refining. The statement also said the aim is to strengthen supply chains and competitiveness.

What is India doing about critical minerals?

India is currently trying to build capacity at home across the critical minerals value chain and to reduce dependence on any one country by building more overseas partnerships for minerals and processing. On the domestic front, the Union Cabinet approved the National Critical Mineral Mission in January 2025 to cover all stages of the value chain, including exploration, mining, beneficiation, processing, and recovery from end-of-life products. It is meant to run from 2024-25 to 2030-31 with substantial public expenditure. India also published a list of 30 critical minerals in July 2023 and has used the Mines and Minerals (Development and Regulation) Amendment Act 2023 to give the Centre more power to auction blocks for critical and strategic minerals. By September 2025, the Ministry of Mines said it had run multiple rounds of such auctions covering several blocks. Further, the state-backed vehicle Khanij Bidesh India Ltd. is currently exploring overseas acquisitions and signing exploration arrangements, including in Argentina and Chile. India has also used changes in customs duty to reduce the cost of importing inputs that it doesn't have enough of at home.

> The MoU covers exploration, mining, processing, recycling, and refining, all of which suit Brazil's goal to move up the value chain rather than just explore raw ores

Finally, the Indian government is also pushing late-stage manufacturing. According to Union Minister for Mines G. Kishan Reddy, India aims to begin domestic production of rare earth permanent magnets by the end of 2026 under a government-backed programme, with the stated goal of cutting import dependence in sectors like electric vehicles and defence.

What does the MoU mean for India?

In India's official briefing, Secretary (East) P. Kumaran said President Lula spoke of Brazil's "substantial" reserves of which only about 30% had been explored and that Brazil would value India as a partner to explore and process them. *Associated Press* reported that the MoU is non-binding. Among other things, the agreement will increase India's bargaining power. If India had only one or two realistic sources of these materials, sellers would know India can't walk away from their terms even if they were exorbitant. Now, however, India can say "we can source from Brazil", which will affect sellers' incentives. The MoU also signals to companies that their inputs won't be disrupted by export controls or geopolitical shocks, encouraging them to invest more. Likewise if India and Brazil get on the same page vis-à-vis environmental and other standards, India can more easily sell finished products into markets that increasingly demand proof about where materials were sourced from.

Does the MoU intersect with Pax Silica?

Pax Silica is a U.S.-led initiative that brings together partner countries; India joined it on February 20. It's meant to make the "silicon stack" — the system that starts with raw materials and runs through factories and equipment, all the way to modern computing, including data centres and AI hardware — more secure. Plainly speaking, Pax Silica sets out a general goal in the form of securing supply chains for the U.S. and its partner countries. The bilateral MoU, signed the next day, could help with one part of that goal, which is to access, and possibly process, certain minerals. However, the MoU doesn't make Brazil a Pax Silica member.

What will the MoU do for Brazil?

According to the U.S. Geological Survey, Brazil has 21 million tonnes of rare earth-oxide equivalent, 2.7 billion tonnes of bauxite, 270 million tonnes of manganese, and 0.4 million tonnes of lithium. From Brazil's point of view, the MoU could be a way to turn this mineral wealth into more value for its industry. Specifically, it could help Brazil attract Indian capital into Brazilian projects, which can make new mines and processing plants easier to finance. It also gives Brazil a large market that can sign long-term purchase contracts so that projects are not built on speculation. The MoU covers exploration, mining, processing, recycling, and refining, all of which also suits Brazil's goal to move up the value chain rather than just explore raw ores, and will strengthen Brazil's negotiating position too.