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# Daily **CURRENT AFFAIRS**

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# 1. U.S. and India call for 'unimpeded' sea trade

## Why in the News?

Recent high-level diplomatic engagements between the United States and India have highlighted the strengthening of their strategic partnership amid rising geopolitical tensions in West Asia. During a four-day visit to India, Marco Rubio held extensive talks with S. Jaishankar on maritime security, trade, energy, and visa issues. The discussions gained significance in the backdrop of the ongoing U.S.-Israel conflict with Iran and concerns over disruptions in the Strait of Hormuz, a critical global energy transit route. Simultaneously, Donald Trump reaffirmed strong support for India, stating that India can "100% count on" the U.S.



## Background

The United States and India are reinforcing their strategic partnership amid global disruptions. U.S. Secretary of State Marco Rubio visited India for four days, holding day-long meetings with External Affairs Minister S. Jaishankar. This visit is the first by a senior U.S. official since the U.S. and Israel launched a war on Iran on February 28. Separately, U.S. President Donald Trump publicly reaffirmed his support for Prime Minister Narendra Modi, stating that India can "100% count on" him.

## Feature

- **Strategic Assurance:** Rubio stated that while the U.S. works with many countries (including Pakistan) on a "tactical" level, none of these relations will come at the "expense" of India. He emphasized that the U.S.-India strategic alliance remains paramount.
- **Maritime Security:** Both leaders called for "safe and unimpeded maritime commerce," specifically addressing the Strait of Hormuz. Rubio accused Iran of blocking the strait, holding civilian vessels hostage, and laying mines in international waters.
- **Bilateral Issues:** The discussions covered energy, bilateral trade, and visa issues for skilled Indian workers.

## Challenge

- **Supply Chain Disruption:** Jaishankar acknowledged disruptions to supply chains due to the U.S.-Israel war on Iran.
- **Strait of Hormuz Stalemate:** Iran's chokehold on the strait threatens energy markets. Iranian officials had previously claimed they would start charging tolls for ships transiting the strait, a move Rubio contradicted by stating the U.S. is working to keep the strait open without tolls.
- **Trade Tensions:** Rubio defended the Trump administration's tough line on trade with India, explaining it is a general policy to counter the previous administration's "outsourcing-based" economy, not a policy aimed solely at India.

## Way Forward

- **Diversification of Energy:** Jaishankar noted that due to the current situation in Hormuz, India must diversify its energy supplies.
- **Diplomatic Resolution:** Rubio reiterated the U.S. commitment to finding a peaceful, diplomatic solution to the Iran crisis, despite ongoing military actions. He also set a clear goal that "Iran can never possess a nuclear weapon."
- **Continued Collaboration:** Both sides agreed to work on maintaining open sea lanes and addressing bilateral trade and visa issues through ongoing dialogue.

## Conclusion

The U.S. and India have presented a unified front on maritime security, with a clear demand for unimpeded trade through the Strait of Hormuz. Despite tactical engagements with other nations like Pakistan, the U.S. assured that India's strategic position remains untouched. While challenges persist-including energy supply risks and trade frictions-both nations are committed to diplomatic solutions, energy diversification, and strengthening their bilateral ties under the broader framework of a free and open Indo-Pacific.

## 2. Development, tribal protection can coexist in Nicobar: Oram

### Why in the News?

The proposed ₹92,000-crore Great Nicobar Island development project is in the news because Union Minister Jai Oram has publicly defended it against strong allegations by Congress leader Jairam Ramesh. Ramesh alleged that the project violates the Forest Rights Act (FRA), 2006, by failing to obtain proper consent from indigenous tribes, particularly the Shompen and Nicobarese. Oram's response-that "development and tribal protection are not mutually exclusive"-has reignited a national debate on whether strategic infrastructure can be built without harming vulnerable tribal groups and their habitats.

### Background

- **The Project:** The Great Nicobar Island (GNI) project is a massive infrastructure initiative costing around ₹92,000 crore. It includes a transshipment port, an international airport, a power plant, and a township.

- **Strategic Importance:** Great Nicobar is located near the Malacca Strait, one of the world's busiest shipping lanes. The project aims to strengthen India's maritime security, enhance its Indo-Pacific presence, and boost regional trade and logistics.
- **Tribal Communities:** The island is home to vulnerable tribal groups, including the Shompen (a Particularly Vulnerable Tribal Group or PVTG) and the Nicobarese, who have historical and legal claims over forest lands under the FRA, 2006.
- **Legal Framework:** The Forest Rights Act, 2006, requires Gram Sabha consent for the diversion of forest land. Additionally, the Protection of Aboriginal Tribes Regulations, 1956, provide habitat protection and restrict external intrusion.

## Feature

### Government's Stance:

- Development and tribal protection can coexist through "robust measures."
- India cannot afford to leave strategically decisive geographies underdeveloped.
- The Forest Rights Act works alongside the 1956 Regulations, which already protect tribal habitats and ways of life.
- Consent from the Shompen community was obtained through the Andaman Adim Janjati Vikas Samiti (AAJVS), a body mandated to advise on tribal welfare.
- As per the island administration, "no tribal habitation is proposed to be displaced."



### Critic's Stance:

The Gram Sabhas that consented to forest land diversion consisted of settler families, not actual Nicobarese or Shompen members who have claims under the FRA.

The AAJVS is an administration-controlled entity and cannot legally consent on behalf of the Shompen community.

He called for the withdrawal of all clearances granted under the FRA.

### Challenge

- **Legal and Constitutional Challenge:** Does the AAJVS have the legal authority to consent on behalf of a PVTG, such as the Shompen, under the FRA? Critics say no, because the FRA mandates Gram Sabha consent, not administrative body consent.

- **Credibility Gap:** The contradiction between "no displacement" (Oram) and "draft relocation plan" (administration's own document) creates mistrust among tribal rights activists and local communities.
- **Balancing Act:** How can India pursue a strategically critical project without violating the habitat and forest rights of vulnerable tribes who have lived in isolation for centuries?
- **Oversight vs. Reality:** While Oram cites satellite monitoring and land mapping as safeguards, ground-level implementation and genuine consent remain unproven.

## Way Forward

- **Genuine Consent Mechanism:** The government should facilitate independent, documented Gram Sabhas involving actual Shompen and Nicobarese community members, not settler families or administrative proxies.
- **Transparent Rehabilitation Plan:** If relocation is unavoidable, a clear, voluntary, and fully informed rehabilitation plan must be made public, with tribal consent at every stage.
- **Independent Monitoring:** As Oram suggested, continuous oversight using satellite monitoring and strict regulatory enforcement should be implemented, but with independent tribal rights observers included.
- **Model of Strategic Frontier Governance:** The government aims to position Great Nicobar as a model where security, ecology, legality, and tribal protection coexist. Achieving this would require unprecedented transparency and community engagement.
- **Judicial or Parliamentary Scrutiny:** Given the legal questions around FRA violations, the matter may need to be examined by a parliamentary committee or the judiciary to set a clear precedent.

## Conclusion

The Great Nicobar Island project represents a critical test for India's ability to balance national security and strategic development with constitutional and legal protections for vulnerable tribal groups. While Union Minister Jai Oram asserts that development and tribal protection can coexist, serious questions remain about the validity of consent obtained through an administration-run body (AAJVS) and the contradiction between "no displacement" claims and existing relocation plans. Resolving this will require genuine tribal consultation, transparency, and independent oversight.

## 3. The U.S. ends Russia oil waiver, implications for India

### Why in the News?

The United States has ended its waiver allowing certain Russian seaborne oil transactions, tightening sanctions again amid the Ukraine war. This is in the news because it directly impacts India, which has become one of the largest buyers of discounted Russian crude since 2022. With India importing nearly 90% of its crude oil, any disruption to Russian supply or tightening of financial and shipping restrictions could raise oil prices, increase inflation, and threaten India's energy security. The news is significant because it highlights the growing tension between Western geopolitics and the energy survival needs of developing economies like India.

## Background

- **The Sanctions Regime:** Following Russia's invasion of Ukraine, the U.S. and its allies imposed heavy sanctions on Russian oil exports, including price caps and shipping restrictions. However, temporary waivers and carve-outs were granted to avoid shocking global energy markets.
- **India's Role:** After 2022, India emerged as a major buyer of Russian crude at discounted prices. This helped India manage inflationary pressures, improve refinery economics, and reduce dependence on traditional West Asian suppliers.
- **Current Development:** The U.S. has now ended a key waiver, tightening restrictions on Russian seaborne oil. This comes at a time when global oil markets are already volatile due to conflicts in West Asia, Red Sea shipping disruptions, and tensions over the Strait of Hormuz.

## Feature

- **India's Vulnerability:** India is the world's third-largest oil importer and fastest-growing energy consumer. Nearly 90% of its crude is imported, and a large share transits through the Strait of Hormuz - a critical chokepoint.
- **Russian Oil as a Diversification Tool:** For India, Russian crude was never just about discounts. It provided supply flexibility and reduced over-reliance on any single region, acting as a hedge against West Asian volatility.
- **The Contradiction in Western Policy:** The U.S. and Europe want to reduce Russia's oil revenues, but they also want low inflation and stable energy prices. These goals are colliding - tighter sanctions risk raising global oil prices, which ironically allows Russia to maintain revenues even with lower volumes.
- **Market Reality:** Despite the push for renewables, the global economy still runs on hydrocarbons. Oil remains central to transport, petrochemicals, agriculture, and trade logistics.

## Challenge

- **Rising Oil Prices & Inflation:** Any tightening of Russian supply, even if symbolic, can trigger fear-driven price spikes. For India, higher crude prices directly increase transport costs, food inflation, fertiliser subsidies, and manufacturing expenses.
- **Maritime & Financial Vulnerabilities:** Energy flows can now be disrupted not just by physical shortages, but by shipping restrictions, insurance controls, financial sanctions, tanker blacklisting, and payment barriers.
- **Strait of Hormuz Risk:** A large share of India's crude and LPG imports transit through this chokepoint. Any escalation involving Iran could disrupt supplies and raise shipping costs significantly.
- **Strategic Autonomy vs. Geopolitical Pressure:** India is caught between Western sanctions regimes and its own need for affordable energy. Excessive dependence on any single geopolitical camp carries long-term risks.

## Way Forward

India needs a broader and more resilient energy framework, according to the author. This includes:

- Expanding Strategic Petroleum Reserves to buffer against supply shocks.

- Diversifying Crude Sourcing Regions beyond Russia and West Asia.
- Strengthening Domestic Exploration to reduce import dependence.
- Improving Refining Flexibility to process different crude grades.
- Accelerating Gas Infrastructure & Alternative Energy Pathways (renewables, nuclear, biofuels).
- Reducing Dependence on Vulnerable Maritime Chokepoints through alternative routes and pipelines.
- Preserving Strategic Autonomy in energy decision-making — neither aligning fully with Western blocs nor becoming overly dependent on any single supplier.

## Conclusion

The U.S. decision to end the Russia oil waiver is not just another sanctions update — it is a signal that the global energy system is becoming increasingly fragmented and unstable. For India, the lesson is clear: opportunistic crude sourcing during crises is not a long-term strategy. The world is entering an era where sanctions, wars, maritime insecurity, and supply-chain disruptions may become recurring features, not temporary exceptions. In the 21st century, economic sovereignty will depend on building diversified, resilient energy systems that can withstand geopolitical shocks. As the author concludes, "Energy systems obey physical realities, not political slogans." India must navigate this new reality with realism, not ideology.

## 4. India's green transition still runs on coal

### Why in the News?

The recent escalation of conflict in West Asia and the resulting spike in global energy prices have once again exposed India's continuing vulnerability to external energy shocks. Despite years of policy emphasis on renewable energy, nearly half of India's fossil fuel imports still transit through the Strait of Hormuz. This news is significant because it challenges the dominant narrative that India is rapidly transitioning to clean energy. While India has made impressive progress in renewable capacity, the article reveals a critical gap: renewables generated only 15.8% of electricity in April 2026, while coal still accounted for 71.8%. In short, India's green transition still runs on coal.

### Background

- **Renewable Growth:** Since 2017, renewables have consistently accounted for the largest share of new power capacity additions. By March 2026, renewables reached 42.4% of installed power capacity, up from just 0.72% in March 2005.
- **Coal's Declining Share in Capacity:** Over the same period, coal's share in installed capacity fell from 58.7% to 42.2%.
- **The Paradox:** Despite these gains, coal still generated 71.8% of India's electricity in April 2026, only marginally lower than 76.2% in March 2019.
- **External Vulnerability:** Nearly half of India's fossil fuel imports (crude from Saudi Arabia, LNG from Qatar) transit through the Strait of Hormuz, making India highly sensitive to West Asian geopolitical tensions.

### Feature

- **Capacity vs. Generation Gap:** This is the central insight of the article. India has succeeded in building renewable infrastructure, but has not yet replaced coal in the actual electricity mix. Renewables are being added on top of coal, not displacing it.
- **Intermittency Problem:** Solar and wind power are intermittent - their output fluctuates with weather and time of day - while electricity demand is continuous. Without large-scale battery storage and flexible grids, coal continues to provide baseload reliability.
- **Coal as Backup:** India has added almost no new fossil fuel capacity since 2018, retired very few old coal plants, and seen gas-based capacity decline. As a result, coal remains the main backup and balancing source.
- **Electricity Prices Linked to Fossil Fuels:** Domestic electricity prices have moved alongside Brent crude in recent years because fossil fuels determine the marginal cost of power.

## Challenge

- **Geopolitical Vulnerability:** A spike in crude prices (due to West Asian tensions) not only raises transport and industrial costs but also pushes up coal prices, electricity tariffs, inflation, and fiscal pressures.
- **Wrong Benchmark:** India's energy transition discourse focuses on installed renewable capacity because it offers an attractive measure of progress. However, power systems depend on actual generation, not headline capacity numbers.
- **Comparison with China & Spain:**
  - China is less exposed because oil and gas account for only 4% of its power mix, and EVs/hybrids now exceed 50% of new car sales, reducing oil demand by over a million barrels a day.
  - Spain has broken the gas-electricity link through renewables integration.
- **Incomplete Transition:** India's transition is real but incomplete. Coal's persistence is not merely policy failure — it currently performs a stabilising function that renewables cannot yet replicate.

## Way Forward

The next phase of India's energy transition requires moving beyond capacity creation towards system transformation:

- **Invest in Storage Infrastructure:** Large-scale battery storage is essential to make intermittent renewables reliable for baseload power.
- **Grid Modernisation:** Flexible grids, improved transmission connectivity, and market mechanisms capable of integrating renewables at scale.
- **Retire Old Coal Plants Strategically:** Not just adding renewables, but actively displacing coal in the generation mix.
- **Decouple Electricity Prices from Fossil Fuels:** Develop mechanisms so that domestic power tariffs are not directly tied to global crude and coal price volatility.
- **Recognise Coal's Stabilising Role:** Any transition plan must acknowledge that coal currently provides grid reliability -and build alternatives before retiring coal capacity.

## Conclusion

India has made remarkable progress in renewable energy capacity, becoming one of the world's fastest-growing green energy markets. However, the article makes a critical point: installed capacity is not the same as actual generation.

As long as coal continues to generate over 70% of India's electricity, the country remains vulnerable to global fossil fuel price shocks and geopolitical instability in West Asia. The green transition is real, but incomplete.

Until India invests in storage, grid modernisation, and system transformation, every spike in global energy prices will serve as a reminder that India's green transition still runs on coal.

## 5. Quad grouping remains a 'vital framework', says Japan's Foreign Minister

### Why in the News?

The Quad grouping (India, US, Japan, Australia) is back in the news because Japanese Foreign Minister Toshimitsu Motegi has publicly reaffirmed that the Quad remains a "vital framework" despite growing scepticism about its relevance. This comes ahead of the Quadrilateral Foreign Ministers' Meeting in New Delhi, where key issues such as the West Asia conflict, the Strait of Hormuz blockade, critical minerals cooperation, and US President Trump's visit to China are expected to be discussed. The news is significant because recent strategic documents from the US, Japan, and Australia have barely mentioned the Quad, raising questions about whether the grouping is losing political priority. Motegi's strong defence of the Quad aims to counter that narrative.

### Background

- **The Quad:** An informal strategic dialogue between India, the US, Japan, and Australia, focused on promoting a Free and Open Indo-Pacific (FOIP), maritime security, economic security, and cybersecurity.
- **Recent Meetings:** The Quad Foreign Ministers met twice in 2025, setting a new agenda.
- **No Recent Summit:** A Quad Summit has not taken place since 2024, amid India-US tensions on several issues.
- **Upcoming Meeting:** The Foreign Ministers' Meeting in New Delhi will host EAM S. Jaishankar, US Secretary of State Marco Rubio, Japanese Foreign Minister Toshimitsu Motegi, and Australian Foreign Minister Penny Wong.

### Feature

- **Motegi's Defense:** He stated, "The Quad remains a vital framework among countries that share fundamental values and strategic interests. It has delivered concrete results across maritime security, economic security, and cybersecurity."
- **Critical Minerals Focus:** Cooperation over critical minerals (needed for green energy and high technology) will be top of the agenda. Japan is already working on critical minerals projects in India and is calling for improved infrastructure, tax subsidies, and IP protection.
- **Energy Resilience Initiative:** Japan has proposed POWERR Asia (Partnership on Wide Energy and Resources Resilience Asia) to coordinate on oil, gas, and renewables procurement, financing, and storage mechanisms to deal with the energy crisis resulting from the Iran conflict.
- **Strait of Hormuz:** Motegi noted that Asian countries are most affected by disruptions in energy and resource supplies passing through the Strait of Hormuz.

## Challenge

- **Dwindling Mention in Strategic Documents:** Despite Motegi's strong words, the Quad has found little or no mention in recent strategic documents of member countries:
  - The US National Security Strategy (November 2025) only briefly mentions encouraging India to contribute to Indo-Pacific security, "including through the Quad," but offers no detailed plans.
  - Japan's 'Updated Free and Open Indo-Pacific' policy (May 2) mentions the Quad just once, in the context of critical minerals.
- **No Quad Summit Since 2024:** The absence of a summit amid India-US tensions raises questions about the grouping's political momentum.
- **Side-stepped Key Questions:** Motegi declined to respond to a question on whether the US's torpedoing of an Iranian ship (IRIS Dena) in the Indian Ocean on March 4 would be raised by Quad members, despite their stated agenda of ensuring peace and stability in the Indo-Pacific.
- **Geopolitical Distractions:** The meeting will also take stock of US President Trump's visit to China, adding another layer of strategic complexity.

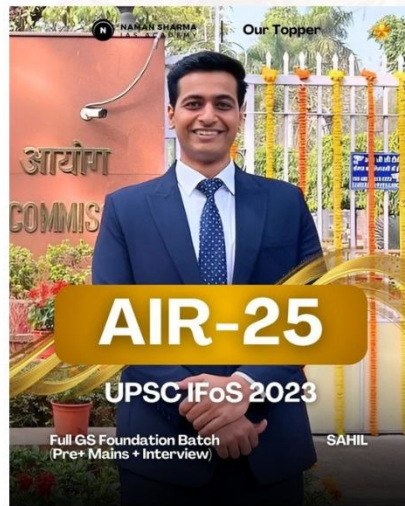
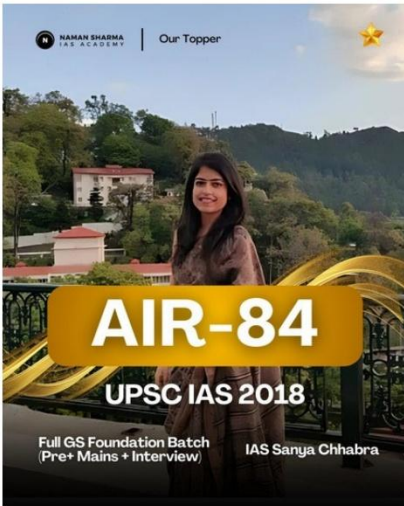
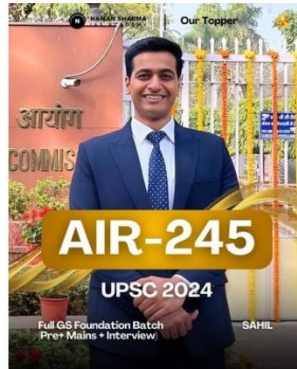
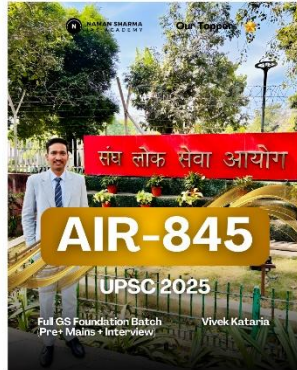
## Way Forward

- **Reaffirm Political Commitment:** Tuesday's meeting aims to send "an unwavering message that the Quad would continue to robustly advance practical cooperation" toward a Free and Open Indo-Pacific.
- **Expand Agenda Beyond Maritime Security:** Critical minerals and energy resilience (POWER Asia) represent new, tangible areas of cooperation that could give the Quad renewed purpose.
- **Address India-US Tensions:** To resume Quad Summits, member countries must resolve bilateral tensions, particularly between India and the US.
- **Clarify Role in West Asia Crises:** The Quad needs to define its position on conflicts outside the Indo-Pacific, such as the Iran-Israel-US confrontation and the Strait of Hormuz blockade, if it claims to address regional and global situations.
- **Move from Rhetoric to Action:** As Motegi noted, the Quad must continue to deliver "concrete results" to remain relevant.

## Conclusion

The Quad is at a critical juncture. While Japanese Foreign Minister Motegi has forcefully argued that it remains a "vital framework," the grouping faces undeniable challenges: waning mention in member countries' strategic documents, the absence of a summit since 2024, and unresolved questions about its role in crises like the Strait of Hormuz blockade. However, new initiatives around critical minerals and energy resilience (POWER Asia) offer a pathway to renewed relevance.

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