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The new lords of the Red Sea

The Houthis vs Saudi Arabia

A parallel state in Yemen, an ideologically committed base, years of warfare, control of the Red Sea coastline and sustained Iranian support have all helped the Shia militant group transform itself into a formidable territorial army and naval force

Stanly Johny

On July 13, an Iranian civilian aircraft carrying a high-level Houthi delegation was heading towards Sana'a, Yemen's capital. Under an unwritten understanding between the Houthis (or Ansar Allah), who control northern and northwestern Yemen, including Sana'a, and the country's Saudi-backed government, planes seeking to land in Houthi-held territory were required to obtain prior approval. The Houthi delegation had left Yemen on July 3 on another Iranian aircraft to attend the funeral of Ayatollah Ali Khamenei, Iran's Supreme Leader who was assassinated by the U.S. and Israel on February 28.

Yemen's Saudi-backed government had protested the Iranian plane transporting Houthi leaders. It also opposed the delegation taking an Iranian plane back home, and instead offered to facilitate their return on a non-Iranian airline. The government's main concern was that the flight could also be used to transport personnel of Iran's Islamic Revolutionary Guard Corps (IRGC) and military equipment to Yemen. The Houthis, nevertheless, chose to return on a Mahan Air flight. To prevent the aircraft from landing, Saudi-backed forces bombed the runway of Sana'a airport, forcing the plane to land in Hodeidah. This was the trigger.

The Houthis responded by bombing Saudi energy infrastructure and launching an offensive in Hodeidah and Taiz governorates. They also imposed a naval blockade on Saudi vessels in the Red Sea. Within two months, the Houthis made dramatic territorial gains, seizing the entire Red Sea coastline of Yemen and taking the Bab el-Mandeb Strait, the narrow chokepoint connecting the Red Sea and the Gulf of Aden, under their control.

A revivalist movement

The roots of the Houthi movement can be traced to 'Believing Youth', a Zaydi revivalist group founded in Northern Yemen in the early 1990s. Hussein al-Houthi and his father, Badr al-Din al-Houthi, influential Zaydi clerics in northern Yemen, became the movement's leading figures. Inspired by the Iranian revolution of 1979 and the rise of Hezbollah in southern Lebanon in the 1980s, Badr al-Din and his sons started building vast social and religious networks among the Zaydi Shias of Yemen, who make up roughly one-third of the Sunni-majority country's population.

In 2004, Ali Abdullah Saleh's government, upset with the growing popularity and rebellion of the Houthis, issued an arrest warrant against Hussein. He resisted the arrest, starting an insurgency. In September, government troops attacked the rebels and killed Hussein. But the movement he founded would only grow, forcing Saleh to step down in 2012 and capturing Sana'a in 2014.

Alarmed by the rise of an Iran-aligned Shia militia across its southern border, Saudi Arabia formed a coalition and declared war against the Houthis in 2015. An intense bombing campaign followed, but the Saudi-led coalition failed to dislodge the rebels, who built a parallel state in northern Yemen. In 2022, amid a broader rapprochement between Iran and Saudi Arabia, the Houthis and Saudi-backed forces agreed to a ceasefire.

The Saudis also struggled to build a credible counterweight to the Houthis inside Yemen. The top leadership of the government was based in Saudi Arabia, while in the south, the UAE-backed Southern Transitional Council broke with the government and pursued its own separatist agenda, further weakening the anti-Houthi camp.

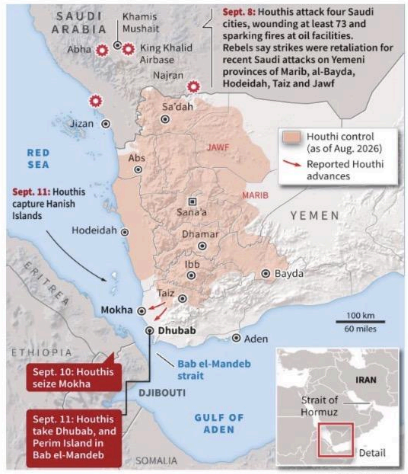
The ceasefire allowed the Houthis to consolidate their position in the north and northwest, despite economic woes. The parallel state, an ideologically committed base, years of warfare and sustained Iranian support enabled the group to transform itself into a formidable territorial army. Their access to the Red Sea, a key shipping route, raised their profile as a naval force. When Israel launched a devastating war on Palestinians in Gaza following Hamas's October 7, 2023 attack, Houthis "declared war" against Israel "in solidarity with the Palestinians". In March 2025, U.S. President Donald Trump announced a major air and naval operation against the Houthis, threatening to destroy the group. Despite the enormous firepower brought against them, the Houthis continued launching missiles and drones at U.S. naval forces. Seven weeks later, Mr. Trump announced an end to the U.S. strikes.

After the U.S. and Israel launched the war on Iran on February 28, the Houthis, to the surprise of many, stayed out of the conflict. Iran retaliated by attacking American bases in the Persian Gulf and shutting down the Strait of Hormuz. The Houthis understood that Iran's closure of the strait strengthened their strategic position: they had the capacity to disrupt maritime traffic through the Red Sea. They also wanted the Saudi blockade of their air space and ports lifted. In the first week of July, as a second round of bombings between Iran and the U.S. was unfolding, the Houthis decided to test Saudi Arabia's resolve by sending a delegation to Iran on an Iranian plane. Saudi Arabia responded by bombing the runway at Sana'a airport as the delegation was returning, effectively breaking the ceasefire. Then the Houthis moved rapidly up the escalation ladder.

Renewed conflict brings Saudi Arabia under enormous pressure. After traffic through the Strait of Hormuz was disrupted by Iran, Riyadh increasingly relied on its Red Sea terminals to export crude oil. Saudi Arabia's East-West Pipeline, connecting its oil fields in the east with the ports on the Red Sea, allowed the Kingdom to skirt the impact of the disruptions in Hormuz to a certain extent. But the Houthis, after the ceasefire broke down, directly targeted Saudi oil infrastructure, apparently in coordination with Iran-aligned Shia militants in Iraq. On September 11, Saudi Arabia announced that the pipeline was shut, following drone attacks from Iraq. In Yemen, in a lightning offensive launched in early September, the Houthis captured the port cities of Mokha and Dhubab and the Perim Island in the Bab el-Mandeb, extending their control along the coast and into the strait.

Extending control

Yemen's Houthi militants captured the Red Sea cities of Mokha and Dhubab, and the Perim Island, extending their control along the coast



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Two chokepoints

More than 20% of the world's seaborne oil trade passed through the Strait of Hormuz before the U.S. and Israel attacked Iran. The Red Sea, which connects Asia and Europe through the Suez Canal in the north and Bab el-Mandeb in the south, typically carries roughly 12-15% of global trade. This means that Iran and Ansar Allah now have the ability to exert pressure on two of the world's critical maritime chokepoints.

On February 27, before the war, both the Strait of Hormuz and the Bab el-Mandeb Strait were open, and Iran was prepared to make concessions on its nuclear programme. On June 17, when the U.S. and Iran signed an MoU, committing Tehran to reopen the Strait of Hormuz in return for sanctions relief from the U.S. and a regional ceasefire involving Lebanon, the Bab el-Mandeb was still fully open. Today, maritime traffic through both the chokepoints is disrupted, any regional ceasefire will have to include Yemen, and any final settlement will have to address the Houthis' demands, while Iran's nuclear programme has been pushed to the back burner.

THE GIST

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- The Red Sea, which connects Asia and Europe through the Suez Canal in the north and Bab el-Mandeb in the south, typically carries roughly 12-15% of global maritime trade
- Iran and Ansar Allah, one of its closest allies, now have the ability to exert pressure on two of the world's critical maritime chokepoints

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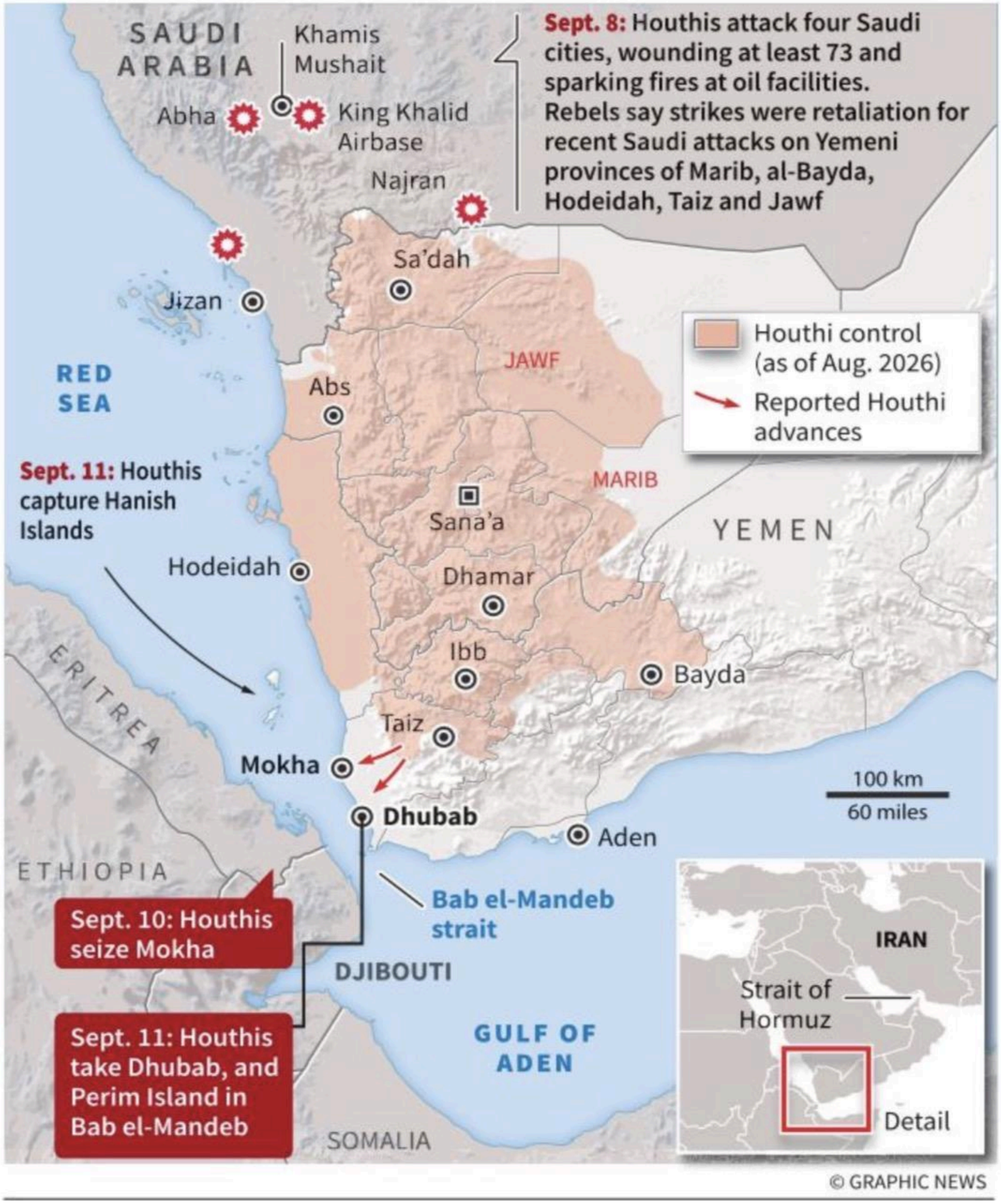


1. The New Lords of the Red Sea

Source: The Hindu
GS-2: International Relations — West Asia & Maritime Security
GS-3: Energy Security & International Trade

1. Context

- The **Houthis**, backed by Iran, have expanded their hold over Yemen's **western coast and strategic Red Sea islands**, moving closer to **Bab el-Mandeb** amid renewed fighting in Yemen.
- Their growing control has raised concerns over the security of a vital **global trade and energy corridor**.

2. Red Sea: Strategic Importance

- **Eastern coast:** Saudi Arabia and Yemen | **Western coast:** Egypt, Sudan, Eritrea and Djibouti.
- It connects the **Indian Ocean with the Mediterranean** through the **Bab el-Mandeb–Red Sea–Suez Canal** system.
- **Key route:** India/Asia → Arabian Sea → Gulf of Aden → **Bab el-Mandeb** → Red Sea → **Suez Canal** → Mediterranean → Europe.
- **Bab el-Mandeb** is the southern gateway; **Suez Canal** is the northern gateway, making the corridor crucial for **Asia–Europe trade and energy flows**.

3. Houthi Expansion: Strategic Locations

- **Mokha:** Major port on Yemen's southwestern Red Sea coast.
- **Dhubab:** Coastal area further south, close to Bab el-Mandeb.
- **Perim (Mayyun) Island:** Yemeni island located within **Bab el-Mandeb**, giving strategic leverage over the strait.
- **Zuqar & Hanish Islands:** Strategic islands in the southern Red Sea that strengthen control over maritime approaches.
- **Significance:** The Houthi advance from the **Yemeni mainland towards the islands and Bab el-Mandeb** increases their ability to threaten commercial shipping.

4. From Regional Conflict to Global Trade Disruption

- **Shipping Disruption:** Missile, drone and maritime attacks make the Red Sea route increasingly risky.
- **Cape of Good Hope Diversion:** Ships avoiding Bab el-Mandeb may travel around **South Africa**, substantially increasing distance and transit time.
- **Higher Costs:** Longer voyages mean greater **fuel, freight and insurance costs**.

- **Suez Impact:** Reduced Red Sea traffic directly affects the **Suez–Mediterranean–Europe trade route**.
- **Global Supply Chains:** Prolonged disruption can increase delivery delays, commodity prices and energy-transport costs.

5. Impact on India

- **Trade:** Higher freight and insurance costs can reduce the competitiveness of **India–Europe exports**.
- **Energy Security:** Longer and costlier shipping can raise the landed cost of **oil and other energy imports**.
- **Supply Chains:** Delays can affect industrial inputs and essential goods.
- **Maritime Security:** Greater risks to **Indian vessels and seafarers** in the Arabian Sea–Gulf of Aden region.
- **Inflation:** Higher energy and logistics costs can feed into domestic prices.
- **Connectivity:** Highlights the need to strengthen **INSTC, IMEC and other alternative corridors**.

6. Way Forward for India

- **Maritime Security:** Strengthen naval surveillance, escort operations and maritime-domain awareness.
- **Route Diversification:** Develop alternative connectivity through **INSTC, IMEC and the Cape route**.
- **Economic Resilience:** Diversify energy suppliers, shipping routes and critical supply chains.
- **Diplomatic Engagement:** Engage **Iran, Saudi Arabia, Yemen and other stakeholders** for de-escalation and freedom of navigation.
- **Strategic Autonomy:** Cooperate with international maritime-security initiatives while retaining an independent regional policy.

THE EAST-WEST PIPELINE RUNS ROUGHLY 1,200 KM ACROSS SAUDI ARABIA, FROM THE ABQAIQ OIL PROCESSING CENTRE IN THE KINGDOM'S OIL-RICH EAST TO THE RED SEA PORT OF YANBU IN THE WEST

Saudi Arabia shuts East-West oil pipeline after attacks: Why it matters for India

Anagha Jayakumar & Sukalp Sharma
New Delhi, September 12

SAUDI ARABIA has temporarily shut its East-West oil pipeline after multiple attacks on the crucial network on Thursday, raising fresh concerns over global oil supplies already strained by disruption in the Strait of Hormuz. The pipeline, also called Petroline, is one of the most important Hormuz-bypass routes for exporting Saudi Arabian crude.

The immediate effect on Saudi oil exports, and consequently on international supplies and prices, will depend on the extent of the damage and how quickly the pipeline can resume operations. For energy import-dependent India, too, there will be ramifications.

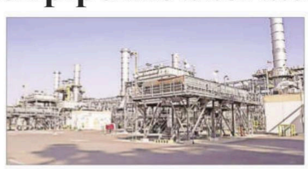
Importance of East-West pipeline

The East-West pipeline runs roughly 1,200 km across Saudi Arabia, from the Abqaiq oil processing centre in the kingdom's oil-rich east to the Red Sea port of Yanbu in the west. From Yanbu, oil tankers headed to Asia usually sail east through the Bab el-Mandeb, while those headed west go through the Suez Canal.

Operated by Saudi Aramco, the pipeline allows Saudi Arabia to move crude oil overland from its main producing region to the Red Sea, rather than shipping it from terminals on the Persian Gulf through the Strait of Hormuz. In fact, the pipeline was built partly as a hedge against risks arising from disruptions in oil flows through Hormuz. Its targeting, however, has demonstrated that alternative routes themselves can become targets in a wider regional conflict.

Before the conflict erupted, the pipeline was operating at just a fraction of its capacity, as exports from the regular route through the Strait of Hormuz were normal. But with maritime traffic through the chokepoint grinding to an effective halt, Aramco started pumping more oil through the Petroline, which has the capacity to transport around 7 million barrels per day (bpd) of crude.

While the actual volume of crude moving through the pipeline has been lower than its capacity, with estimates ranging around 4-5 million over the past few months, it is still significant and represents 4-5% of global oil supplies. This route has therefore served as an important safety valve for global oil supplies during the current crisis.



The pipeline, also called Petroline, is one of the most important Hormuz-bypass routes for exporting Saudi Arabian crude. REUTERS

The worry for India

Saudi Arabia had traditionally been among the top sources of crude oil for India. While supplies from Riyadh have fallen notably amid the Hormuz crisis, Saudi oil still accounted for 7-8% of India's total oil imports over the past couple of months. And a vast majority of these came from the Yanbu export facility. In August, India imported about 332,000 bpd of Saudi oil, accounting for 7.2% of New Delhi's total oil imports for the month, as per tanker data from Kpler. In July, oil imports from Riyadh stood at about 414,000 bpd, and made up 8.2% of India's oil imports.

The first impact of the Petroline's shutdown for India would be on supplies, and Indian refiners will have to find replacement volumes. While that can be managed, given India's highly diversified crude import slate, higher prices for those alternative barrels will be the bigger headache. Amid the West Asia conflict, India's crude oil import bill surged by over 56% on a year-on-year (y-o-y) basis in April-July to $63.4 billion, even as import volumes rose slightly to 81.9 million tonnes — or about 600 million barrels — from 81.5 million tonnes, as per data from the Petroleum Planning and Analysis Cell.

Energy imports are a major component of India's overall imports, and any meaningful increase has ramifications for the country's trade balance, current account, inflation, and the rupee's exchange rate, among others. India is the world's third-largest consumer of crude oil and depends on imports to meet over 88% of its requirement. Put simply, an oil shock can be considered an external tax on the Indian economy.

Given its high oil consumption and import dependency, India is already bearing the brunt of high oil prices. The country imports 1.8-2 billion barrels of oil a year, and every $1-per-barrel increase in price bumps up its oil import bill by up to $2 billion on an annualised basis.

It also said that every 10% oil price increase typically widens India's current account deficit by 0.4% of the GDP. Crude oil alone is the country's largest merchandise import. According to Commerce Ministry data, crude oil imports in 2025-26 stood at about $135 billion. If oil prices sustain at $100 per barrel in the current financial year and import volumes don't decline, the oil import bill could be upwards of $200 billion for the year. If the price sustains at a much higher level, the implications would be even graver.

FULL REPORT ON WWW.INDIANEXPRESS.COM

2. Saudi Arabia Shuts East–West Oil Pipeline: Why It Matters for India

Source: The Indian Express
GS-3: Indian Economy — Energy Security & External Sector

1. Context

- Saudi Arabia temporarily shut its **East–West oil pipeline (Petroline)** after attacks on its crude network, amid disruption in the **Strait of Hormuz**.

2. East–West Pipeline: Strategic Importance

- **~1,200 km:** Connects **Abqaiq** in oil-rich eastern Saudi Arabia to **Yanbu** on the Red Sea.
- **Capacity: ~7 million barrels/day (bpd)**.
- **Purpose:** Carries Saudi crude **east to west**, bypassing the **Strait of Hormuz**.
- From Yanbu, crude can move through the **Red Sea** → **Bab el-Mandeb** → **Indian Ocean**, providing an alternative maritime route for Asian markets.
- Recent actual flows were around **4–5 million bpd**, but the pipeline remains a major **Hormuz-bypass lifeline**.

3. Impact on India

- **High import dependence:** India imports around **88% of its crude requirement**.
- **Saudi supply:** Saudi Arabia accounts for roughly **7–8% of India's crude imports**.
- **Oil-price shock:** Supply disruptions can push up international crude prices and India's import bill.
- **External-sector pressure:** Every **$1/barrel rise** can add roughly **$2 billion** to India's annual oil import bill.
- **Inflation & CAD:** Higher crude prices can increase inflation and widen the **current account deficit**, while putting pressure on the rupee.

4. Wider Implications

- **Global Energy Security:** Disruption to both **Hormuz and alternative Saudi routes** increases vulnerability of global oil supplies.
- **Strategic Infrastructure:** Shows that pipelines, ports and other **energy infrastructure can become targets during regional conflicts**.
- **Shipping Costs:** Greater reliance on longer alternative routes raises **freight, insurance and transportation costs**.
- **Geopolitical Risk:** Escalation involving **Saudi Arabia, Iran and other West Asian actors** can create wider instability in global energy markets.
- **Global Inflation:** Sustained oil-price increases can raise production and transportation costs worldwide.
- **India's Vulnerability:** High import dependence makes external energy shocks a major risk to **inflation, growth, CAD and currency stability**.

ADDIS ABABA

In latest war of words, Eritrea says Ethiopia is destabilising region

AFP

Eritrea on Saturday accused Ethiopia of destabilising the region, in the latest war of words between the two fractious Horn of Africa neighbours. "While Eritrea has maintained strict strategic patience, Addis Ababa has been immersed in incessant escalation of its war rhetoric for more than three years now." AFP

3. Eritrea–Ethiopia: A New Flashpoint in the Horn of Africa

Source: The Hindu
GS-2: International Relations — Africa, Red Sea & Regional Security

1. Context

- **Eritrea has accused Ethiopia of destabilising the Horn of Africa**, marking a fresh escalation in relations between the two neighbours.
- The dispute is increasingly linked to **Ethiopia's quest for Red Sea access**, unresolved tensions in **Tigray**, and competing regional alliances.

2. Ethiopia–Eritrea: What Is the Issue?

- **Ethiopia:** A large **landlocked country** since Eritrea's independence in 1993; it seeks reliable access to the **Red Sea**, particularly through Eritrean ports such as **Assab**. Ethiopia has offered negotiations on maritime access while asserting its sovereignty and security interests.
- **Eritrea:** A **Red Sea coastal state** controlling ports including **Assab and Massawa**; it views Ethiopia's maritime ambitions and military posture as a potential threat to its sovereignty and security.
- **Tigray factor:** The **2020–22 Tigray War** ended with the **2022 Pretoria Agreement**, but territorial, political and security issues remain unresolved. Renewed tensions between Ethiopia, Tigrayan factions and Eritrea are again raising fears of conflict.

3. Why the Horn of Africa Matters

- **Red Sea access:** Ethiopia's search for maritime connectivity is reshaping relations with Eritrea and neighbouring states.
- **Strategic location:** The Horn overlooks the **Red Sea–Bab el-Mandeb maritime corridor**, one of the world's major trade routes.
- **Regional spillover:** Escalation could interact with conflicts in **Sudan, Tigray and Somalia**, creating wider instability.
- **Geopolitical competition:** Egypt, Gulf states, Iran, Türkiye, Israel and other powers have strategic interests in the Red Sea and Horn of Africa.

‘S-400 destroyed Pak. plane 314 km away during Operation Sindoor’

Saurabh Trivedi
NEW DELHI

An S-400 air-defence unit of the Indian Air Force destroyed a Pakistani special-mission aircraft at a distance of 314 km during Operation Sindoor, marking one of the longest surface-to-air engagements claimed by India, according to the Defence Ministry’s Annual Report for 2025-26 released on Sunday.

The report described the engagement as a demonstration of the IAF’s long-range air-defence capability, saying it challenged the adversary’s belief that distance could provide protection from Indian air-defence systems.

“Indian radars tracked the threat in silence”, and a long-range surface-to-air missile was guided to its target at the far end of its engagement envelope, the report said. The operation, it added, demonstrated that targets at considerable distances were within the reach of the IAF’s air-defence architecture.

The report said the operation demonstrated that even distant targets were within the IAF’s air-defence architecture’s reach. AFP

Prime Minister’s visit

The report said Prime Minister Narendra Modi subsequently visited Air Force Station Adampur on May 12, 2025, and commended the air warriors involved in the operation. It also noted that 219 Presidential Gallantry Awards were awarded to IAF personnel on August 15, 2025, for their role during the operation.

The engagement was part of a broader integrated air-defence effort during the four-day conflict from May 7 to 10, 2025. The IAF, which is responsible for the country’s air defence, exercised centralised control and coordination through its indigenous Integrated Air Command and Control System (IACCS).

According to the report, the IACCS acted as the foundational framework for integrated air-defence operations by integrating military and civil surveillance sensors and providing stakeholders with a common Recognised Air Situation Picture.

Operations were centrally controlled through IAF Networked Tactical Nodes at multiple locations. These nodes played a key role in the identification and classification of aerial targets, with trained operators ensuring that civil aircraft were not engaged during the hostilities, the report said.

The report also alleged that Pakistan kept its civil airspace open during the conflict, including the operation of civil flights during hostile action. In contrast, India’s conduct was aimed at ensuring that international air traffic was not put at risk.

4. S-400 & Operation Sindoor: India’s Long-Range Air Defence Capability

Source: The Hindu
GS-3: Defence Technology | Internal Security

1. Context

- During **Operation Sindoor (May 7–10, 2025)**, an Indian Air Force **S-400 air-defence unit reportedly engaged a Pakistani aircraft at 314 km**, demonstrating India's long-range air-defence capability.

2. S-400 Triumf — Basics

- **Origin:** Russia | **Type:** Long-range surface-to-air missile (SAM) system.
- **Purpose:** Detects, tracks and destroys **aircraft, cruise missiles and certain ballistic-missile threats**.
- **Range:** Up to **~400 km**, depending on the missile used.
- **Multi-layered system:** Uses different missiles to engage threats at different ranges and altitudes.
- **Key components:** Long-range surveillance radar, engagement radar, command-and-control system and missile launchers.
- **Strength:** Simultaneous detection/tracking of multiple aerial threats and engagement from considerable distances.

3. India's Integrated Air Defence

- S-400 operates within the **Integrated Air Command and Control System (IACCS)** rather than as a standalone weapon.
- **IACCS:** Integrates military and civil surveillance sensors to create a **common recognised air situation picture**.
- **IAF Networked Tactical Nodes:** Enable identification and classification of aerial targets and coordinate air-defence responses.
- This integration helps distinguish **hostile threats from civilian aircraft**, reducing the risk of unintended engagement.

4. Significance for India

- **Long-range deterrence:** Threats can be engaged well before reaching protected targets.
- **Airspace protection:** Strengthens India's ability to defend critical military and strategic assets.
- **Network-centric warfare:** Demonstrates the importance of combining **sensors + command networks + missile systems**.
- **Strategic lesson:** Modern air defence depends not only on missile range but on **integrated detection, identification, decision-making and interception**.

Union Home Minister Amit Shah with Maharashtra CM Devendra Fadnavis and Deputy CM Eknath Shinde in Mumbai, Sunday. AKASH PATIL

Uniform Civil Code in all 21 NDA states before 2029: Shah

Express News Service
Mumbai, September 13

THE UNIFORM Civil Code will be implemented across all NDA-ruled states before the 2029 Lok Sabha elections, Union Home Minister Amit Shah said on Sunday.

Speaking to reporters in

firing a bullet. Kashmir is an integral part of India."

Shah said, "In the last 12 years, the BJP-led NDA government has pushed major reforms on many fronts, including social, economic and criminal justice. The Bharatiya Nyaya Sanhita (BNS) has been effectively enforced. The rate of

5. Uniform Civil Code: From Article 44 to Nationwide Implementation

Source: The Indian Express
GS-2: Indian Polity & Constitution — DPSP, Fundamental Rights, Federalism

1. Context

- Union Home Minister **Amit Shah** stated that the government aims to implement the **Uniform Civil Code (UCC) in all 21 NDA-ruled States before the 2029 Lok Sabha elections**.
- UCC seeks a common civil-law framework irrespective of religion, particularly in matters of **marriage, divorce, adoption, maintenance, inheritance and succession**.

2. UCC — Constitutional & Legal Framework

- **Article 44:** Directs the State to endeavour to secure a UCC throughout India; it is a **Directive Principle of State Policy**.
- **Concurrent List, Entry 5:** Covers marriage, divorce, adoption, succession, joint family and related matters; therefore, **both Parliament and State Legislatures** have legislative competence.
- **Article 254:** In case of repugnancy between Central and State laws on a Concurrent List subject, **Central law ordinarily prevails**; a State law can prevail within that State with **Presidential assent under Article 254(2)**.
- **Present status:** Uttarakhand has implemented its UCC; Gujarat and Assam have passed UCC legislation; Goa follows a historically evolved common civil-law framework.

3. Significance

- **Gender Justice:** A common framework can address discriminatory provisions in personal laws and advance **Articles 14 and 15** — equality and non-discrimination.
- **Individual Dignity & Autonomy:** Uniform civil rights can strengthen individual decision-making in marriage, divorce, inheritance and family matters, supporting **Article 21**.
- **Common Citizenship:** Similar civil rights irrespective of religion can strengthen equality before law and constitutional citizenship.
- **Legal Simplification:** A harmonised framework can reduce multiplicity and complexity arising from different personal-law regimes.
- **Social Reform:** Enables the State to reform discriminatory practices while retaining freedom of religion in genuinely religious matters.

4. Challenges

- **Religious Freedom:** UCC must be reconciled with **Articles 25–26**, which protect freedom of conscience and religious practice.
- **Cultural Diversity: Article 29** protects cultural interests; excessive uniformity could be perceived as cultural homogenisation.
- **Tribal & Customary Laws:** Existing constitutional protections for tribal and customary practices require careful accommodation.
- **Uniformity vs Equality:** A law may be formally uniform but still produce unequal outcomes; the objective should therefore be **substantive equality**.
- **Federalism:** Different State-level UCC laws may create inconsistencies, making coordination under the **Concurrent List and Article 254** important.
- **Majoritarianism:** Reform must be rights-based and should not be perceived as imposing the practices of one community on others.

5. Judicial Evolution

- **Shah Bano (1985):** Upheld maintenance rights and highlighted the need for a common civil framework.
- **Sarla Mudgal (1995):** Addressed conversion to circumvent marriage law and advocated UCC.
- **John Vallamattom (2003):** Struck down a discriminatory succession provision.
- **Shayara Bano (2017):** Invalidated instant triple talaq, reinforcing constitutional scrutiny of discriminatory personal-law practices.
- **Jose Paulo Coutinho (2019):** Recognised Goa’s common civil-law system as an important example in the UCC debate.

6. Way Forward

- **Rights-based reform:** Make **equality, dignity and gender justice** the foundation of UCC.
- **Consultative federalism:** Involve States, legal experts, women’s organisations, religious communities and tribal groups.
- **Harmonise before homogenising:** Remove discriminatory practices across personal laws while preserving legitimate customs consistent with Fundamental Rights.
- **Phased implementation:** Learn from State-level experience before moving towards a wider national framework.
- **Constitutional safeguards:** Ensure that reform advances **Article 44 without diluting Articles 14, 15, 21, 25–29**.
- **Build consensus:** UCC should emerge through dialogue and constitutional legitimacy rather than purely majoritarian political consensus.

• ECONOMY

Copper prices up: Fear of Trump tariffs amid US-China tensions

Pratyush Deep
New Delhi, September 13

COPPER PRICES have surged in recent months to hit a record high of $14,767.5 per tonne on September 9. Three-month copper futures, which are contracts for future purchase, on the London Metal Exchange (LME) remained above the $14,000-per-tonne mark for most of August before climbing in September.

Why copper price rise matters

The red metal is essential to the modern economy, with uses ranging from housing and manufacturing to power grids, clean energy, artificial intelligence and defence. Thus, its price is often seen as a barometer of economic health. A rise in copper prices is considered a signal of robust economic growth, while falling prices tend to raise concerns about an economic slowdown.

However, the current rally appears to have a different story.

According to industry insiders, the surge is less about expectations of stronger global economic growth and more about concerns over potential tariffs by the United States, which could come into effect from January 2027.

US-led factors

While US President Donald Trump imposed a 50% tariff on semi-finished and derivative copper imports in August last year, refined copper has so far been exempted. However, there is a proposal to impose a 15% tariff on refined copper imports from January, to be increased to 30% in 2028.

"In anticipation of US tariffs, people are selling materials from LME warehouses to warehouses of US COMEX (Commodity Exchange). As a result, there has been a shortage of copper stocks that can be traded on the LME. That is why the futures prices have gone up," an industry executive told *The Indian Express*.

This has resulted in a huge buildup of inventories in the US, two industry sources told *The Indian Express*. "Inventory at LME is currently at 2,65,000 tonnes, and inventory at Shanghai Futures Exchange (SHFE) is at around 63,000 tonnes. However, the inventory of US' COMEX is at around 7,00,000 tonnes," an industry source told *The Indian Express*.

Sumit Jhunjhunwala, Vice President & Sector Head, Corporate Sector Ratings, ICRA Ltd, also said that copper prices have remained elevated mainly due to constrained mine supply and the ongoing geographical rebalancing of inventories. "Any major delay or lower-than-expected US tariff could reverse these inventory flows, potentially releasing accumulated stocks into global markets and exerting downward pressure on copper prices," Jhunjhunwala said.

Copper in US-China trade war

Last year, too, Trump's imposition of a 50% tariff on semi-finished and derivative copper imports prompted US buyers to stockpile the metal ahead of its implementation on August 1, heavily contributing to the surge in copper prices.

The move followed a report submitted by the US Secretary of Commerce, which claimed that copper imports threatened to impair US national security.

In 2025, the US imported $16.2 billion worth of copper products. China accounted for 20% of these imports, followed by Mexico at 17%, the European Union at 14%, Canada at 10% and Vietnam at 8%, as per the US Congressional Research Service.

In April that year, Trump announced a 50% tariff on the full value of semi-finished copper products and a 25% tariff on the full value of copper-intensive derivative products. The latter rate was reduced to 10% where at least 95% of the copper, steel and aluminium used in the product was sourced from the US. These tariff measures are part of broader trade tensions between the US and China, with China being the world's largest consumer of copper.

Against trend

- Copper price is often seen as a barometer of economic health. A rise in copper prices is considered a signal of robust growth, while falling prices tend to raise concerns about an economic slowdown.
- However, the latest rise comes despite prospects of steady global economic growth clouded by trade tensions, the West Asia conflict, and uncertainty.

6. Copper Prices Rise Amid U.S.–China Trade Tensions

Source: The Indian Express
GS-3: Indian Economy — Critical Minerals, Industry, International Trade

1. Context

- Copper prices touched a record **$14,767.5/tonne on September 9**, despite uncertainty over global growth.
- The rally is being driven by **constrained mine supply, U.S. tariff expectations, inventory movements and geopolitical uncertainty**.

2. Copper — Uses & Strategic Importance

- Copper is a key industrial metal due to its **high electrical and thermal conductivity, durability and recyclability**.
- **Major uses:** Power grids & electrical equipment | Construction & housing | Manufacturing | EVs & transport | Renewable energy | Electronics, AI & data centres | Defence.
- Rising **electrification, clean-energy deployment and digitalisation** are expected to increase copper demand.
- Hence, copper is increasingly important as a **critical mineral for economic and strategic security**.

3. Global Copper Landscape

- **Largest mine producers (2025): Chile (~5.4 Mt) | DRC (~3.3 Mt) | Peru (~2.7 Mt)**.
- **Largest reserves: Chile (~180 Mt) | Australia (~100 Mt) | Peru (~85 Mt)**.
- **Global reserves: ~980 Mt**.
- **Production ≠ reserves:** production is annual extraction, while reserves are economically recoverable deposits.
- The geographical concentration of production and reserves creates **supply-chain vulnerability and geopolitical risks**.

4. Why Are Prices Rising?

- **Supply constraints:** Slow expansion of mine supply is tightening the market.
- **U.S. tariff expectations:** Anticipated tariffs encouraged American buyers to **stockpile copper**, increasing near-term demand.
- **U.S.–China tensions:** China is the world's largest copper consumer, making trade restrictions significant for global demand and supply chains.
- **Geopolitical uncertainty:** Trade and security tensions are encouraging precautionary stocking.
- **Inventory redistribution:** Movement of stocks towards the U.S. has reduced availability in some markets.

5. Economic & Strategic Significance

- Copper is traditionally viewed as a **"barometer of economic activity"** because it is extensively used across construction, manufacturing and infrastructure.
- However, the current price rise is **not simply a signal of stronger economic growth**; supply constraints and trade policy are major drivers.
- Persistent high prices can increase the cost of **electricity infrastructure, renewable energy, manufacturing, electronics and construction**.
- Thus, copper security is becoming an important component of **energy security, industrial resilience and the global clean-energy transition**.

6. Implications for India

- India's expansion of **power networks, renewable energy, EVs, electronics, manufacturing and digital infrastructure** will raise copper demand.
- Higher global prices can increase **input costs and infrastructure expenditure**.
- Import dependence exposes India to **global price volatility, supply disruptions and geopolitical risks**.
- Securing copper supplies is therefore important for **India's industrialisation, energy transition and strategic autonomy**.

7. Way Forward

- **Domestic capacity:** Accelerate exploration and responsible development of domestic copper resources.
- **Recycling:** Expand recovery of copper from e-waste and end-of-life electrical equipment.
- **Diversification:** Develop reliable and geographically diversified import sources.
- **Overseas assets:** Encourage acquisition of copper mines and long-term supply agreements abroad.
- **Critical-mineral strategy:** Integrate copper security with India's broader **critical-minerals and supply-chain resilience policy**.

Building consensus

The 18th BRICS Summit pushed for changes in traditional power equations

Reaffirming the importance of reformed multilateralism in a world riven with unilateral actions by superpowers emerged as a binding theme of the 18th BRICS Summit and the New Delhi Declaration. The Summit's success could be measured by three main parameters – the participation of members at the highest levels, the importance given to intra-BRICS trade cooperation mechanisms and the consensus achieved by Indian negotiators in forging a joint statement in a time of war. The government should be commended for ensuring that Iran and the UAE, two rivals in the West Asian conflict, used the occasion for their highest-level bilateral meeting since the war began. The New Delhi Declaration, which was issued despite scepticism about all the differences within the grouping, presented the BRICS as a formidable front in its 20th year. Among the BRICS members, the position of Saudi Arabia, which has yet to formally join the group, remains ambiguous, as Foreign Minister Faisal bin Farhan Al Saud arrived after the main session where the joint statement was adopted on Saturday. For the other members, however, the consensus was clear on issues of global importance. The declaration made a call for the reform of the Security Council and support

7. Building Consensus: The 18th BRICS Summit

Source: The Hindu
GS-2: International Relations — BRICS, Global Governance, Global South

1. Context

- The **18th BRICS Summit and New Delhi Declaration** reaffirmed the need for **reformed multilateralism** amid increasing unilateral actions by major powers.
- The Summit's effectiveness was reflected in **high-level participation, emphasis on intra-BRICS cooperation and consensus-building despite differences among members**.

2. Key Outcomes of the New Delhi Declaration

- **Global governance:** Called for **UN Security Council reform** and a greater role for **India and Brazil**, along with new initiatives for global governance.
- **Trade & finance:** Supported stronger **intra-BRICS trade** and greater use of **local currencies**.
- **Protectionism:** Condemned **unilateral sanctions and tariffs**.
- **Conflict & peace:** Condemned **unilateral wars** and took a strong position on Israel's actions in **Palestine and Lebanon**.
- **West Asia:** Despite deep differences over the Iran–UAE conflict, BRICS achieved a joint position through compromise.
- **Saudi Arabia:** Its position remained ambiguous as it had not formally joined the grouping.

3. India's Diplomatic Gains

- **Global South leadership:** India strengthened its image as a **balancer and bridge-builder** with diplomatic access to competing power centres.
- **Iran:** PM Modi's engagement with President **Masoud Pezeshkian** helped address concerns over India's perceived tilt towards the U.S. and Israel.
- **China:** Modi–Xi Jinping engagement provided an opportunity to reaffirm the political will to **normalise bilateral relations**.
- **ASEAN & Africa:** Engagement with Southeast Asian and African leaders reinforced India's wider **Global South partnerships**.
- **Strategic autonomy:** BRICS allowed India to maintain engagement with multiple power centres while protecting its independent foreign-policy space.

4. Significance

- **Reformed multilateralism:** BRICS is increasingly seeking changes in traditional global power structures.
- **Global South:** Provides emerging economies a collective platform to influence global governance.
- **Economic cooperation:** Greater intra-BRICS trade and local-currency transactions can strengthen economic resilience.
- **Consensus diplomacy:** The joint declaration demonstrated that countries with divergent geopolitical interests can still cooperate on common global concerns.
- **Changing world order:** Reflects the gradual shift from a predominantly Western-led order towards one increasingly influenced by **emerging economies**.