

THE USA–IRAN CONFLICT AND THE RECALIBRATION OF INDIAN FOREIGN POLICY

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ABSTRACT

This paper undertakes a systematic analysis of the confrontation between the United States and Iran and its consequences for Indian foreign policy during the period 2025–2026. It reconstructs the historical and proximate causes of the conflict; quantifies India's exposure to it through energy, connectivity, remittance, and diaspora-welfare channels; and examines the parallel recalibration of India's relationships with the United States, Israel and China. Deploying a neoclassical realist framework supplemented by Indian strategic-culture literature on the historical mandala doctrine, the paper argues that India's celebrated posture of 'strategic autonomy' or 'multi-alignment' is less a settled grand strategy than a continuously renegotiated set of hedges, whose costs became newly visible during the 2025–2026 crisis. Operation Sindoor of May 2025 is treated as a discrete case study illuminating both the operational depth of India's partnership with Israel and the limits of India's assumed standing among the Gulf Arab states. The paper concludes that India's foreign policy under Prime Minister Narendra Modi has demonstrated considerable tactical dexterity but has not resolved, and perhaps cannot resolve, the underlying structural dilemma of a rising but still import-dependent power navigating a genuinely multipolar and increasingly volatile international system.

Keywords: *Israel, Iran, Strategic partnerships, Operation Sindoor, Foreign policy, War, tariff.*

INTRODUCTION

The years 2025 and 2026 compressed several distinct strategic developments into a single, tightly interwoven crisis. A twelve-day war between Israel and Iran in June 2025 drew the United States into direct combat against Iran's nuclear infrastructure for the first time in the history of the Islamic Republic; a further round of strikes followed in February 2026, confirming that the underlying dispute remained unresolved. Almost simultaneously, India fought and prosecuted Operation Sindoor against Pakistan-based terrorist infrastructure in May 2025; elevated its relationship with Israel to a "Special Strategic Partnership for Peace, Innovation and Prosperity" in February 2026; absorbed the most severe tariff regime the United States has ever imposed on an Indian export basket, reaching 50 percent by August 2025; and reopened

its border dialogue with China at the Shanghai Cooperation Organisation summit in Tianjin in August–September 2025. None of these developments can be understood in isolation. Read together, they constitute an unusually clear stress test of the proposition, repeatedly asserted by successive Indian governments since the end of the Cold War, that India can simultaneously deepen its ties with Washington, Tel Aviv, Tehran, Moscow, Riyadh and Beijing without being compelled into a single camp.

This paper treats that proposition as an open empirical question rather than a settled fact. It proceeds in eleven further sections. Section - 2 sets out the theoretical apparatus — realist balance-of-power and balance-of-threat theory, alliance theory, and the specifically Indian literature on strategic culture and multi-alignment — through which the empirical material is read. Section - 3 reconstructs

the historical and contemporary causes of the USA–Iran conflict. Section - 4 quantifies its impact on India across four channels: energy, connectivity, diaspora, and macroeconomic exposure. Sections - 5 and 6 trace, respectively, the recent trajectory of India's relationships with the United States and with Israel. Sections - 7 and 8 examine how India balances its West Asia relationships while deepening ties with Israel, and why a binary choice of sides remains structurally unattractive to Indian policymakers. Section - 9 uses Operation Sindoor as an extended case study. Section - 10 situates the India–US relationship alongside the simultaneous, tactically motivated thaw with China. Section - 11 draws these strands together into an account of the Modi government's foreign policy vision and section - 12 concludes.

A Note on Sources, Method, and Limitations

Two methodological caveats govern how the evidence in this paper should be read. First, on citation precision: classical works of international relations theory (Waltz, Mearsheimer, Walt, Snyder, Jervis, Schweller, Paul, Vital, Karnad) are cited here at the level of the whole work or, where reasonably identifiable, the relevant chapter, rather than at the level of a specific page. This is a deliberate choice: assigning a precise page number to a paraphrased argument without the physical text in hand to verify it would risk false precision — a citation that looks more rigorous than it actually is. A reader wishing to verify a specific theoretical claim made here should therefore treat the citation as pointing to the general argument of the cited chapter or work, and should consult the original for exact wording and pagination.

Second, on source character: several sources cited in Sections 4, 6, 9 and 11 are not neutral wire-service reporting and should be read with that in mind. Doordarshan News (DD News) is owned and operated by Prasar Bharati, an organ of the Government of India, and its characterisation of international reactions to Operation Sindoor — while a legitimate primary record of what the Indian state itself reported — is not independent

verification of those reactions and is flagged as such wherever it is the principal source for a claim. The World Socialist Web Site is the publication of the International Committee of the Fourth International and carries an explicit editorial line critical of both the Indian and American governments; it is cited here only for a small number of descriptive, independently corroborated facts (dates, sequencing) rather than for its interpretive framing. Finally, because a substantial portion of this paper's empirical material concerns events in the second half of 2025 and the first half of 2026, several figures — contract values, headcounts, and the precise wording of official statements in particular — rest on a single press or trade-publication report rather than a peer-reviewed or triangulated source, and should be treated as provisional pending confirmation from primary government documentation where it becomes available.

THEORETICAL FRAMEWORK

Three bodies of theory inform the analysis that follows, and it is important to state at the outset that they do not point in the same direction — part of the analytical value of using all three is precisely that they generate different predictions about Indian behaviour, against which the empirical record can be tested. The first is structural realism in its balance-of-power and balance-of-threat variants. Kenneth Waltz's account of great powers balancing against concentrations of capability, and John Mearsheimer's offensive-realist emphasis on pre-emption under conditions of anarchy, together explain the logic of the Israeli and American strikes on Iran as an attempt to prevent an adversary from acquiring an equalising capability before the regional balance could shift decisively (Waltz, 1979; Mearsheimer, 2001; Walt, 1987). A strict Waltzian or Mearsheimerian reading would further predict that India, facing a rising and more capable China, should be balancing hard against Beijing rather than expanding trade with it; the China-thaw evidence examined in Section 10 sits uncomfortably with this prediction and is one of the clearest points at which structural realism alone underperforms as an

explanation of Indian behaviour. Stephen Walt's refinement — that states balance against perceived threat rather than raw power alone — performs somewhat better here: it helps explain why Gulf Arab states, despite decades of rivalry with Iran, hedged toward de-escalation rather than open alignment with the Israeli-American campaign, since the proximate threat to their own territory from a wider war outweighed their residual antipathy toward Tehran (Waltz, 1979; Mearsheimer, 2001; Walt, 1987).

The second body of theory concerns alliance management under conditions of asymmetry, and offers a materially different explanation of Indian hedging than pure structural realism does. Glenn Snyder's alliance security dilemma — the tension between the fear of abandonment and the fear of entrapment — illuminates India's reluctance to fully align with either the US–Israel axis or with Iran and Russia: full alignment with Washington risks entrapment in conflicts not of India's choosing (as the Gaza war and the Iran strikes illustrate), while excessive distance risks abandonment on issues, such as Kashmir or the China border, where India needs great-power backing (Snyder, 1997; Jervis, 1978). Where Waltzian realism would predict India resolving this tension by picking the stronger or more threatened-against pole, Randall Schweller's concept of underbalancing and T. V. Paul's account of soft balancing instead predict exactly the sustained, deliberate non-resolution that the empirical record shows: India possesses the structural incentive to balance decisively against China but persistently fails to do so, using economic engagement as insurance rather than committing to a formal counter-coalition. This is the paper's second point of theoretical tension — Schweller and Paul explain the puzzle that Waltz and Mearsheimer's frameworks, taken alone, leave unresolved (Schweller, 2004; Paul, 2005).

The third body of theory is specifically Indian and is, on its own terms, not fully a realist theory at all. The classical Kautilyan mandala doctrine — in which a state's immediate neighbour is treated as a natural adversary and the neighbour's

neighbour as a natural ally, with concentric circles of interest radiating outward — offers an indigenous vocabulary for practices that would appear contradictory within a purely bloc-based, Western reading of alliance politics. C. Raja Mohan's account of India's post–Cold War abandonment of ideological non-alignment for interest-based engagement with all major powers, and Kanti Bajpai's typology of Indian strategic-culture schools (Nehruvianism, neoliberalism, and hyperrealism), together provide the vocabulary of “multi-alignment” that Indian officials, and Foreign Minister S. Jaishankar in particular, now use self-consciously to describe their approach (Mohan, 2003; Bajpai et al., 2014b; Kautilya, n.d.; Rajagopalan, 2014; Bajpai, 2014a). This vocabulary should not, however, be accepted at face value as a neutral description of Indian behaviour, and it is here that Bharat Karnad's realist critique becomes analytically important rather than merely supplementary: Karnad argues that “strategic autonomy” and “multi-alignment” function in Indian official discourse as much as a rhetorical device — allowing New Delhi to claim principled independence while in practice bandwagoning with whichever power offers the best immediate terms — as a genuine, costly, consistently applied doctrine (Karnad, 2018). David Vital's older theorisation of the constrained menu of choices available to militarily and economically asymmetric states lends some support to Karnad's scepticism: if India's choices are in fact as structurally constrained as Vital's framework suggests, then “multi-alignment” may describe the optimal use of a narrow set of options rather than the exercise of genuine strategic freedom that the term implies (Vital, 1967). The empirical sections that follow are read against this three-way tension rather than as illustrations of a single confirmed theory, and the paper returns explicitly to which framework the 2025–2026 evidence favours in Section 11.2.

CAUSES OF THE USA–IRAN CONFLICT: HISTORICAL AND CONTEMPORARY

Historical Origins

The structural mistrust between Washington and Tehran predates the Islamic Republic itself, rooted in the 1953 Anglo-American engineered overthrow of the democratically elected government of Mohammad Mosaddegh and the subsequent restoration of the Shah — an episode that Iranian revolutionary discourse has never ceased to invoke as the founding grievance of the relationship. The 1979 Islamic Revolution and the ensuing 444-day hostage crisis at the American embassy in Tehran inverted the relationship from client-patron to open adversary, a rupture cemented through the 1980s by American diplomatic and material backing for Iraq during the Iran–Iraq War, notwithstanding Iraq's use of chemical weapons against Iranian forces. The nuclear question emerged as the organising axis of the conflict from the early 2000s onward: the 2015 Joint Comprehensive Plan of Action (JCPOA) represented a rare and fragile diplomatic thaw, but the first Trump administration's unilateral withdrawal from the deal in May 2018, followed by the January 2020 killing of Islamic Revolutionary Guard Corps commander Qassem Soleimani, restored the relationship to a state of open hostility from which it never fully recovered.

The Collapse of Diplomacy and the Twelve-Day War, June 2025

The proximate cause of the 2025 war lies in the collapse of indirect nuclear diplomacy mediated by Oman during the spring of 2025. Israel launched Operation Rising Lion on 13 June 2025, striking Iranian nuclear facilities, nuclear scientists and senior military leadership in a single coordinated wave (American Jewish Committee, n.d.). A week of reciprocal Israeli-Iranian strikes followed before the United States directly intervened on the night of 21–22 June 2025, when six B-2 stealth bombers struck the enrichment sites at Fordow, Natanz and Isfahan, dropping twelve GBU-57/B Massive Ordnance

Penetrator bunker-buster bombs on Fordow alone (Council on Foreign Relations, 2026). This marked the first occasion on which a sitting American president had ordered a direct military strike on another state's nuclear programme, and the first time Washington had joined Israel as an active co-belligerent against a shared adversary (Council on Foreign Relations, 2026).

Damage assessments diverged sharply along institutional and national lines. American officials described all three sites as having sustained “extremely severe damage and destruction” and claimed the Iranian nuclear programme had been set back by approximately two years; a leaked Defence Intelligence Agency report, by contrast, concluded the underground facilities had not been fully collapsed and that the setback was a matter of months rather than years; Israeli intelligence assessments fell between these two positions, while the International Atomic Energy Agency confirmed “enormous” but not fully assessable underground damage (Congressional Research Service, 2025). Iran's retaliatory missile strike on the American Al Udeid airbase in Qatar on 23 June was pre-announced through back-channels to Doha and Washington and caused no casualties, functioning as a face-saving off-ramp that allowed President Trump to declare a ceasefire within hours of the Iranian response (Encyclopaedia Britannica, n.d.).

Iran's Domestic Fragility and the Wider Regional Context

The war's trajectory was shaped as much by Iran's internal condition as by the military balance. A collapsing rial, chronic economic mismanagement, and cumulative sanctions pressure produced mass protests across all thirty-one Iranian provinces by late 2025; human rights organisations estimated that security forces killed more than six thousand demonstrators and arrested tens of thousands more during the subsequent crackdown, while the regime imposed a nationwide internet blackout to obscure the scale of the violence (American Jewish Committee, n.d.; Council on Foreign Relations, 2026). Iran's position was further weakened by the

attrition its regional proxy network — Hezbollah, Hamas, and allied militias — had suffered during the prolonged Israel-Hamas war since October 2023, leaving Tehran with markedly less capacity to open additional fronts than at any point in the preceding two decades (Encyclopaedia Britannica, n.d.). Although American and Israeli officials publicly disclaimed any intention of pursuing regime change, independent analysis of the targets selected suggested this was not the operational aim, even as media reporting indicated that senior Iranian figures had begun discussing potential successors to the eighty-six-year-old Supreme Leader, Ali Khamenei (House of Commons Library, 2025).

The February 2026 Escalation

The ceasefire proved durable only in the narrowest sense. A further round of joint American-Israeli strikes on Iran in late February 2026 confirmed that the underlying disputes over enrichment capacity, ballistic-missile development, and regional proxy support remained unresolved, and that the June 2025 war had produced a fragile truce rather than a

settlement (Modern Diplomacy, 2026). Notably, this second wave of strikes coincided almost exactly with Prime Minister Modi's state visit to Israel on 25–26 February 2026, embedding India's diplomatic calendar directly into the crisis timeline and, as discussed in Section - 6 below, linking India's own strategic choices inescapably to the war's escalation (World Socialist Web Site, 2026).

IMPACT OF THE USA–IRAN WAR ON INDIA

Energy Security and Import Dependence

India's exposure to a US–Iran war operates most directly through energy dependence. India meets over 80 percent, and by some FY2024–25 estimates as much as 88.6 percent, of its crude oil consumption through imports, making it the world's second- or third-largest crude importer depending on the measure used (Directorate General of Commercial Intelligence and Statistics, 2025; SEAir Exim Solutions, n.d.).

Supplier	Approx. Share of Indian Crude Imports	Notable Trend
Russia	31–38%	Rose from ~1% (2017) to peak of ~38% (2024); premium/discount volatile amid sanctions
Iraq	16–30%	Consistently India's second-largest and most stable supplier
Saudi Arabia	14–16%	Long-term contract reliability; anchor of strategic reserve restocking
UAE	11–14%	Growing share via ADNOC direct supply and Singapore-based traders
United States	3–8% (rising sharply)	Fastest-growing supplier; up 81.8% in value 2024–2025

Sources: Directorate General of Commercial Intelligence and Statistics (2025); Visual Capitalist (2025); Sasakawa Peace Foundation (2025); TradeInt (n.d.); World's Top Exports (2026).

Iran's near-total blockade of the Strait of Hormuz at the height of the June 2025 war disrupted an estimated 46 to 50 percent of India's crude oil imports and around 90 percent of its LPG imports, a dependency that translated almost instantly into domestic inflationary pressure on transport fuel and cooking gas prices (Directorate General of Commercial Intelligence and Statistics, 2025; Visual Capitalist, 2025; Modern Diplomacy, 2026). New Delhi's public response was one of calculated caution: it avoided naming an aggressor and issued only generalised calls for de-escalation and diplomacy, a posture that critics both domestic and international read as a de facto tilt toward Washington and Tel Aviv even in the absence of an explicit declaration (Modern Diplomacy, 2026). The Trump administration's parallel use of secondary sanctions, and a threatened 25 percent tariff on states maintaining trade ties with Iran, added a further layer of economic coercion to the diplomatic pressure India faced during the crisis (Modern Diplomacy, 2026).

The Chabahar Dilemma and Connectivity

India's investment in the Chabahar port on Iran's southeastern coast was conceived precisely to bypass both the Hormuz chokepoint and hostile Pakistani territory, opening a corridor to Afghanistan and Central Asia through the International North–South Transport Corridor (INSTC) via Iran's Bandar Abbas (IMPRI Impact and Policy Research Institute, n.d.; The Tribune, n.d.). The intensification of American secondary sanctions after 2025 rendered this investment what analysts, including Michael Kugelman of the Atlantic Council, have termed a “damaged asset”: Washington revoked India's sanctions waiver for the project in mid-2025, and although New Delhi secured a temporary six-month exemption after careful negotiation in October 2025, the long-term viability of the project remains genuinely in question (IMPRI, n.d.). Geopolitical strategist Brahma Chellaney has warned that any Indian retreat from Chabahar would directly benefit Beijing's connectivity ambitions in the region, since the port sits barely 170 kilometres from the Chinese-financed Gwadar port in Pakistan, and China's

twenty-five-year comprehensive cooperation agreement with Tehran and its higher tolerance for sanctions exposure position it to absorb any Indian withdrawal (IMPRI, n.d.). The episode has unfolded alongside India's deepening defence-technology partnership with Israel — elevated to a Special Strategic Partnership during Modi's February 2026 visit even as New Delhi sought to preserve its Iran relationship — illustrating the narrowing room within which India's strategic-autonomy doctrine currently operates (IMPRI, n.d.).

Diaspora, Remittances, and Human Welfare

A third, less visible channel of exposure concerns the welfare of the Indian diaspora resident across West Asia. Nearly nine to 9.7 million Indian nationals live and work across the six Gulf Cooperation Council states — 4.3 million in the UAE, 2.65 million in Saudi Arabia, and smaller but significant populations in Kuwait, Qatar, Oman and Bahrain (Arab News, 2025; Sociology.Institute, 2026). Although this Gulf-based population constitutes only around one-quarter of India's total overseas diaspora of 35.4 million, it accounts for close to 40 percent of India's total remittance inflows, with the UAE alone contributing roughly 19.2 percent of the national total, followed by Saudi Arabia at 6.7 percent and Qatar at 4.1 percent (Arab News, 2025). India received a record \$137.7 billion in total remittances in 2024, the highest figure for any country in the world, up from \$83.2 billion in 2020 (New Kerala, 2026). A regional conflagration involving Iran, Israel and the Gulf states therefore carries direct and immediate consequences for the foreign-exchange stability of Indian states with high rates of Gulf migration, notably Kerala, Tamil Nadu, and, increasingly, Uttar Pradesh (Sociology.Institute, 2026; Arab News, 2025).

RECENT TRENDS IN INDIA'S FOREIGN POLICY VIS-À-VIS THE UNITED STATES

COMPACT, Mission 500, and the Pre-Crisis Trajectory

At the outset of the period under study, the trajectory of India–US relations appeared strongly positive. During Modi's February 2025 visit to Washington, the two leaders launched the COMPACT framework (Catalysing Opportunities for Military Partnership, Accelerated Commerce and Technology) and committed to “Mission 500” — more than doubling bilateral trade, then estimated at \$129.2 billion in goods for 2024, to \$500 billion by 2030 (Drishti IAS, n.d.; CNBC, 2025). India's trade surplus with the United States stood at \$45.7 billion in 2024, and the US remained the third-largest source of cumulative foreign direct investment into India, at \$65.19 billion since 2000 (Office of the United States Trade Representative, 2025). Defence cooperation deepened correspondingly: bilateral defence procurement exceeded \$20 billion cumulatively, and by October 2025 the two sides had signed a new ten-year Framework for the US–India Major Defence Partnership (2025–2035), which the Pentagon described as “the most ambitious and wide-ranging bilateral document yet”, encompassing co-production of Javelin anti-tank guided missiles, a Reciprocal Defence Procurement Agreement, and an Autonomous Systems Industry Alliance for AI-driven defence cooperation (Drishti IAS, n.d.; CNBC, 2025; Congressional Research Service, 2026a).

The 2025 Tariff Crisis

This trajectory was violently disrupted in the second half of 2025. On 1 August 2025 the Trump administration imposed a 25 percent “reciprocal” tariff on Indian goods, citing India's average applied tariff rate of 17 percent (against a 3.3 percent US rate) and a persistent bilateral goods trade deficit that made India the source of the tenth-largest US bilateral trade gap in 2024 (Congressional Research Service, 2026b; Chatham House, 2025). A second, secondary tariff of 25 percent, tied explicitly to India's continued purchase of discounted Russian crude oil, took effect from 27 August 2025, bringing the cumulative rate to 50 percent — among the highest imposed on any US trading partner and a rate that made India one of the most expensive markets in the world for American importers (Chatham House, 2025; Wikipedia, n.d.). Analysis by

the investment bank Jefferies Group, cited widely in subsequent commentary, suggested the unusually punitive scale of the tariff owed as much to President Trump's personal frustration at India's public refusal to credit him with mediating the May 2025 India–Pakistan ceasefire as to the underlying trade dispute itself; former National Security Advisor John Bolton later described Trump's claim of having “brought peace to India and Pakistan” as inappropriate (Wikipedia, n.d.). India reportedly paused an estimated \$3.6 billion in pending US defence acquisitions, including Stryker combat vehicles and Boeing aircraft, in response, though the government subsequently denied any formal freeze (Wikipedia, n.d.). Leader-level contact between the two governments was notably limited through mid-to-late 2025, and the scheduling of the Quad leaders' summit itself was cast into doubt (Wikipedia, n.d.; International Institute for Strategic Studies, 2026).

The February 2026 Trade Deal and Its Limits

Relations were partially, though not fully, repaired through a bilateral trade agreement announced on 2 February 2026, which reduced the reciprocal tariff from 50 percent to 18 percent in exchange for an Indian commitment to zero tariffs on an agreed list of American goods and a wind-down of Russian oil purchases (The White House, 2026). The US Department of Commerce's parallel imposition, on 25 February 2026, of preliminary countervailing duties of 125.87 percent on Indian crystalline silicon photovoltaic cells and modules illustrated that sectoral frictions persisted even after the headline tariff reduction (Chatham House, 2025). Analysts at the Stimson Center and Chatham House converged on a similar assessment: the deal offered a welcome reset but did not eliminate the sources of friction that had produced the 2025 deterioration, and other powers — China, Russia, and Pakistan among them — had used the extended period of India–US distrust to their own advantage (Stimson Center, 2026; Chatham House, 2025). Pakistan in particular, according to Stimson Center analysis, exploited the rift more effectively than any other actor, positioning itself as responsive to Washington's

requests on counter-terrorism, critical minerals, Iran policy, and Gaza diplomacy, and is consequently unlikely to view the restored US–India partnership as foreclosing its own continued cooperation with the Trump administration (Stimson Center, 2026). As the International Institute for Strategic Studies has observed, the Trump administration's approach to India, in contrast to the values-based framing that characterised the Biden years, has been explicitly interest-based and transactional — anchored in shared concern over China, defence sales, and market access for American firms rather than a shared democratic identity (International Institute for Strategic Studies, 2026).

RECENT TRENDS IN INDIA'S FOREIGN POLICY VIS-À-VIS ISRAEL

The Depth of Defence-Industrial Integration

India's relationship with Israel deepened without interruption even as ties with Washington frayed. According to SIPRI's Trends in International Arms Transfers 2025, India absorbed 29 percent of Israeli arms exports by volume in the five-year period 2021–2025, with a cumulative contract value estimated at \$20.5 billion for 2020–2024 alone; other industry estimates place India's share of Israeli arms exports as high as 34 to 37 percent across the same period, making India by a considerable margin Israel's single largest defence-export market (Stockholm International Peace Research Institute, 2026; The Red Zone, 2026; Observer Research Foundation, 2025; The Jerusalem Post, 2026). Israel has in turn risen to become the world's seventh-largest global arms exporter, with record exports of \$14.8 billion in 2024 alone, a 56 percent increase over the 2016–2020 period (Observer Research Foundation, 2025). On the Indian side of the ledger, Russia's share of Indian arms imports fell to 40 percent in 2021–2025 (down from 70 percent in 2011–2015), with the resulting structural space filled substantially by France (29 percent) and Israel (15 percent) (Stockholm International Peace Research Institute, 2026). Recent transactions illustrate the trajectory: a \$3.3 billion deal for 425,000 carbine

assault rifles from a joint Israeli-Indian venture; the November 2025 signing of a new memorandum of understanding at the seventeenth Israel-India Joint Working Group; and the announcement, alongside Modi's February 2026 visit, of defence contracts worth a further \$10 billion spanning air-defence architecture, including systems related to the Iron Dome, David's Sling and Arrow families (Foundation for Defense of Democracies, 2025; The Jerusalem Post, 2026). By value, however, India's formal goods imports from Israel remain comparatively modest in the UN Comtrade accounting — \$1.33 billion in 2024, of which arms and ammunition constituted only \$128.4 million — a discrepancy explained by the fact that the largest and most strategically significant transactions are structured as long-term contracts, co-production arrangements, and offset agreements that are not fully captured in annual trade statistics (Trading Economics, n.d.).

The February 2026 Special Strategic Partnership

Prime Minister Modi's state visit to Israel on 25–26 February 2026 — only his second visit, and the first occasion on which an Indian head of government addressed the Israeli Knesset — formally elevated the bilateral relationship to a “Special Strategic Partnership for Peace, Innovation and Prosperity” (Press Information Bureau, 2026; Fox News, 2026). The visit produced twenty-seven distinct bilateral outcomes: sixteen agreements and eleven joint initiatives spanning artificial intelligence, the establishment of an Indo-Israeli Cyber Centre of Excellence, cybersecurity, education, agriculture, and a labour-mobility arrangement to bring 50,000 Indian workers to Israel to address shortages created by the post-October 2023 restrictions on Palestinian labour (The Diplomat, 2026b; World Socialist Web Site, 2026). Israeli Prime Minister Benjamin Netanyahu publicly described the visit as “extraordinarily productive” (The Diplomat, 2026b). Strategically, the timing proved highly consequential: the visit concluded only days before the joint American-Israeli military campaign against Iran resumed, meaning that India's most consequential recent bilateral upgrade in West Asia was formalised

at the very moment its principal defence partner in the region was preparing for renewed war (World Socialist Web Site, 2026; Hungarian Institute of International Affairs, 2026).

BALANCING WEST ASIA RELATIONS WHILE SUSTAINING A STRONG ISRAEL PARTNERSHIP

India's approach to West Asia is best understood through the classical Kautilyan idiom of the mandala, in which a state cultivates relationships with both proximate and distant states according to interest rather than ideological affinity or bloc membership (Kautilya, n.d.; Rajagopalan, 2014). In practice, this produces parallel, compartmentalised relationships that would appear internally contradictory within a purely bloc-based reading of international politics: India is simultaneously the largest single purchaser of Israeli arms exports, a long-standing infrastructure partner of Iran at Chabahar, the largest source of expatriate labour to the Gulf monarchies, and a rapidly growing defence-technology partner of Saudi Arabia and the United Arab Emirates through frameworks such as I2U2 and the India-Middle East-Europe Economic Corridor (IMEC) (The Tribune, n.d.; Daily Pioneer, n.d.). The 2023 acquisition by the Adani Group of Israel's Haifa Port for \$1.2 billion exemplifies the layering of these relationships: Haifa functions as a critical node in IMEC even as Adani's joint ventures with Israeli arms manufacturers — including Adani-Elbit Advanced Systems — simultaneously deepen the India-Israel defence-industrial relationship, and the Mundra-to-Haifa route has additionally served as an alternative shipping corridor circumventing Houthi attacks in the Red Sea (Middle East Eye, n.d.; New Internationalist, 2026).

Foreign Minister S. Jaishankar has explicitly theorised this approach as “multi-alignment” rather than a revival of Nehruvian non-alignment, articulating the doctrine in the compressed formula: engage America, manage China, cultivate Europe, reassure Russia, and bring Japan into play — a logic

that extends naturally to West Asia, where India engages Iran even while strengthening relations with Israel and the United States (The Tribune, n.d.; Daily Pioneer, n.d.). At a recent seminar, Jaishankar further articulated a “neighbourhood first” policy in which India positions itself as the region's preferred infrastructure and security partner, adding that the purpose of strategic autonomy “is not to solve problems but to manage relationships to national advantage” (The Tribune, n.d.). The costs of this balancing act are, however, non-trivial. Commentators including Brahma Chellaney have warned that continued hedging on Chabahar could hand China a durable connectivity advantage, while others have argued that India's comparative silence on the Gaza war has undercut the credibility it seeks to project in the wider Global South, even as its defence partnership with Israel deepens in parallel — a critique pressed most sharply by the left-wing World Socialist Web Site, whose interpretive framing is not shared by the more measured Indian and Hungarian analyses cited elsewhere in this section but whose underlying factual observation, that Indian commentary on Gaza has been markedly muted, is not seriously disputed (IMPRI, n.d.; East Post, 2026; World Socialist Web Site, 2026).

WHY INDIA CANNOT SIMPLY PICK A SIDE

Four structural constraints, each empirically grounded, explain India's persistent reluctance to align fully with any single pole in West Asia. First, energy dependence: India imports over 80 percent of its crude oil requirement, sourced in shifting but substantial proportions from Russia (31–38 percent), Iraq (16–30 percent), Saudi Arabia (14–16 percent) and the UAE (11–14 percent); Gulf and Iranian supply lines cannot be substituted overnight without severe price and inflationary consequences, as the Hormuz disruption of June 2025 demonstrated (Directorate General of Commercial Intelligence and Statistics, 2025; Visual Capitalist, 2025; Modern Diplomacy, 2026). Second, diaspora exposure: with close to 9.7 million Indian citizens living and working

across the Gulf states and remitting nearly 40 percent of India's \$137.7 billion in annual global remittances, their safety and continued employment constitute a direct domestic political stake that a confrontational policy toward any Gulf actor would jeopardise (Arab News, 2025; New Kerala, 2026). Third, connectivity competition: India's own infrastructure investments — Chabahar, IMEC, and the INSTC — depend on maintaining working relationships with both Iran and the Gulf Arab states simultaneously, since these routes function as mutually reinforcing hedges against Pakistani and Chinese chokepoints rather than mutually exclusive alternatives (IMPRI, n.d.). Fourth, and most fundamentally, the deliberate multi-vector design of Indian grand strategy since the early 2000s — traceable through the scholarship of C. Raja Mohan and others on India's post-Cold War abandonment of ideological non-alignment for interest-based engagement with all major powers — treats the ability to trade, procure arms, and negotiate with rival blocs simultaneously as itself a source of strategic leverage rather than a weakness requiring resolution (Mohan, 2003; Bajpai et al., 2014b).

Choosing a side in West Asia would convert India from an autonomous pole capable of talking to Tehran, Tel Aviv, Riyadh and Washington into a dependent client of whichever bloc it joined — a status that Indian strategic culture, shaped by memories of colonial subordination and articulated across multiple generations of Indian strategic thought from K. Subrahmanyam to Jaishankar, treats as a first-order threat to sovereign decision-making capacity (Ministry of External Affairs, 2026; Jaishankar, 2020; Menon, 2016). David Vital's classical theorisation of the constrained menu of

choices facing asymmetric powers, and Bharat Karnad's realist observation that India's declared strategic autonomy often exceeds its willingness to bear the costs of genuine non-alignment, together suggest that this posture, while strategically rational, is not without its own contradictions and vulnerabilities, particularly under conditions — such as those of 2025–2026 — where great powers apply simultaneous and compounding pressure across multiple fronts at once (Karnad, 2018; Vital, 1967).

OPERATION SINDOOR: A CASE STUDY IN INDIA'S WEST ASIA RELATIONS

Background and Execution

Operation Sindoor offers a compact and empirically rich case study of how India's regional relationships actually functioned under stress. Launched in the early hours of 7 May 2025 in response to the 22 April 2025 terrorist attack at Pahalgam, Jammu and Kashmir, which killed twenty-six civilians (twenty-five Indian nationals and one Nepali national) and was attributed to The Resistance Front, a proxy of the Pakistan-based Lashkar-e-Taiba, the tri-service operation targeted nine terrorist infrastructure sites across Pakistan and Pakistan-occupied Kashmir, including facilities at Bahawalpur and Muridke (Doordarshan News, 2025a; India's World, n.d.). Indian officials reported the elimination of more than one hundred terrorists and the destruction of eleven Pakistani air bases, describing the operation, in the words of the Ministry of Defence, as “focused, measured, and non-escalatory” (Doordarshan News, 2025a, 2025b).

International Reaction: A Comparative Matrix

Actor	Character of Reaction
Israel	Unambiguous solidarity; ambassador affirmed India's right to self-defence; operational use of Israeli-origin loitering munitions and air-defence systems
United States	Initial hesitation, then support for India's counter-terrorism right; Trump simultaneously claimed ceasefire-brokering credit, generating friction
Saudi Arabia / UAE / Qatar	Cautious de-escalatory diplomacy; Saudi Minister of State Adel al-Jubeir shuttled between New Delhi and Islamabad; UAE pursued quiet parallel-track diplomacy
Turkey	Open alignment with Pakistan; warned of "an all-out war" and condemned India's strikes
United Kingdom, France, EU-27, Japan	Affirmed India's right to self-defence; unified EU statement
Russia	Condemned terrorism generally while urging restraint from both sides
China	Provided military, intelligence and political support to Pakistan even as the broader China-India border thaw continued

Sources: Doordarshan News (2025a, 2025b); India's World (n.d.); The New Arab (2025); Swadeshi Shodh Sansthan (2026); The Diplomat (2026a).

This pattern of reaction confirms the Waltian logic outlined in Section 2: Gulf states, notwithstanding considerable sympathy for India's counter-terrorism grievance, prioritised regional stability and their own mediation ambitions — visible also in their parallel efforts during the Ukraine war — over unequivocal alignment with New Delhi, while Israel's response reflected a qualitatively different, operationally embedded partnership rather than mere diplomatic solidarity (The New Arab, 2025; Waltz, 1979; Mearsheimer, 2001; Walt, 1987).

One Year On: A Sober Reassessment

Assessments published around the operation's first anniversary in May 2026 concluded that its declared strategic objective — the diplomatic isolation of Pakistan and India's consolidation as West Asia's preferred security partner, in a posture some Indian commentators explicitly likened to Israel's regional role — was only partially realised. Pakistan instead expanded its diplomatic space, hosting sensitive negotiations and deepening military ties across West Asia even as India's government struggled to explain why it had not used its simultaneously cordial

relations with both the US-Israel axis and Iran to broker peace during the wider June 2025 war, nor moved to ease its relative silence on the Gaza war in order to strengthen its own regional standing (East Post, 2026). The subsequent Israel-Iran-US war also demonstrated, through satellite-tracked strikes on American bases at Prince Sultan (Saudi Arabia), Muwaffaq Salti (Jordan), the Fifth Fleet headquarters at Manama (Bahrain), and Erbil (Iraq), that Gulf territory itself had become an active frontline for exchanges between Iran and its adversaries — a vulnerability of direct relevance to India's own basing-adjacent and overflight interests in the region (The Print, n.d.).

Lessons for India's West Asia Policy

The central lesson Operation Sindoor offered New Delhi was therefore double-edged. On the one hand, India's partnership with Israel had matured to the point of being operationally indispensable and diplomatically declarative rather than merely transactional, extending well beyond procurement into co-development and battlefield integration (East Post, 2026). On the other hand, India's assumption that accumulated goodwill with the Gulf states would translate automatically into strategic backing, or that its simultaneous West Asia relationships would earn it a peacemaking role in the wider regional theatre, proved considerably harder to cash in than policymakers appear to have anticipated (East Post, 2026; Swadeshi Shodh Sansthan, 2026). This gap between aspiration and outcome is consistent with Schweller's underbalancing thesis: India possessed the diplomatic access to play a mediating role but lacked either the institutional appetite or the coalition-building infrastructure to convert that access into influence (Schweller, 2004; Paul, 2005).

THE INDIA-US RELATIONSHIP IN CONTEXT, AND OCCASIONAL BONHOMIE WITH CHINA

The Tariff-Thaw Paradox

The India-US relationship in 2025–2026 illustrates a paradox at the heart of Indian grand strategy: the country's closest security partner has simultaneously been the source of its most severe recent economic coercion, while its principal long-term strategic rival offered a convenient counterweight precisely when Washington applied pressure. Within five days of the imposition of the 50 percent US tariff in August 2025, Prime Minister Modi travelled to China for the first time in seven years to attend the Shanghai Cooperation Organisation summit at Tianjin, telling President Xi Jinping that India was “committed to progressing our relations based on mutual respect, trust and sensitivities” (Al Jazeera, 2025; CNN, 2025). Beijing reciprocated by lifting restrictions on exports of rare-earth magnets, fertiliser and tunnel-boring machinery in August 2025, while New Delhi relaxed its 2020 Press Note 3 investment-screening rules — originally directed primarily at China — in March 2026 (East Asia Forum, 2026).

The Scale of Economic Entanglement with China

The scale of India's economic entanglement with China complicates any simple reading of the relationship as purely adversarial. Bilateral trade reached a record \$155.6 billion in 2025, a 12.8 percent year-on-year increase, making China India's largest or second-largest trading partner depending on the year measured, while India's trade deficit with China simultaneously widened to a record \$99.2 billion in FY2024–25 and was projected to reach \$106 billion for calendar year 2025 (Whalesbook, 2026; Tejimandi, 2025; Business Standard, n.d.). Approximately 70 to 80 percent of India's imports from China are concentrated in electronics, machinery, organic chemicals and plastics — categories that Indian trade analysts including Ajay Srivastava of the Global Trade Research Initiative describe as “difficult to substitute quickly”, explaining the persistence of a large bilateral deficit despite a decade of stated Indian policy aimed at reducing exactly this dependence (Tejimandi, 2025; Business Standard, n.d.).

Interpreting the Thaw: Tactical or Strategic?

Analysts are divided on how to read this rapprochement. Some frame it as evidence that Washington can no longer assume it can rely on India as an automatic counterweight to China, with Al Jazeera's Beijing correspondent noting that Modi appeared to have "made the calculation that he should be moving closer to Beijing" (Al Jazeera, 2025). Others, including analysis published in the East Asia Forum, caution that the rapprochement is tactical rather than strategic: the underlying border dispute remains unresolved, and China's continued military, intelligence and political support to Pakistan during Operation Sindoor demonstrated the limits of the détente even as it survived that crisis intact (The Diplomat, 2026a; East Asia Forum, 2026). The International Crisis Group's Praveen Donthi similarly observes that India's re-engagement with Beijing has, unlike India's emotionally charged Pakistan policy, remained largely free of public domestic scrutiny, giving the Modi government considerably more room to manoeuvre pragmatically without appearing weak to its political base (International Crisis Group, 2025). The most plausible synthesis, consistent with the neoclassical realist readings introduced in Section - 2, is that New Delhi is hedging against an unreliable United States without abandoning its underlying threat assessment of China — using economic engagement with Beijing as insurance while continuing to build military capability, including through the Quad, against the same power it is simultaneously courting commercially (International Crisis Group, 2025; Ganguly, 2016; Tellis, n.d.; Schweller, 2004; Paul, 2005).

THE MODI GOVERNMENT'S FOREIGN POLICY VISION

Multi-Alignment as Doctrine

The thread connecting these developments is a foreign policy vision that the Ministry of External Affairs and Foreign Minister Jaishankar have described in successive addresses as a shift from

non-alignment to multi-alignment: a doctrine that treats the maintenance of independent, interest-based relationships with all major powers — rather than membership of any single bloc — as the core source of Indian strategic leverage (Ministry of External Affairs, 2026; Jaishankar, 2020; The Tribune, n.d.).

This vision rests on three pillars. The first is strategic autonomy as practice rather than slogan: India procures defence platforms from Russia, France, Israel and the United States simultaneously, and has resisted, though not always successfully, American pressure to halt trade with Iran or Russia, eventually yielding substantially on Russian crude purchases once the economic cost of the 50 percent tariff became unsustainable (The Tribune, n.d.; Wikipedia, n.d.). The second is "neighbourhood first" combined with an ambition to be West Asia's indispensable partner rather than a peripheral actor — a role that Operation Sindoor was partly designed to advertise, with only partial success, as documented in Section 9 (The Tribune, n.d.; East Post, 2026). The third is a civilisational and domestic-political register: the Modi government has consistently paired foreign policy assertiveness with a narrative of India as a rising, self-reliant power no longer willing to accept great-power tutelage, a narrative visible in its posture during both the US tariff dispute and the China thaw, and echoed in Modi's Knesset address describing Israel as a "brother country" bound to India by a civilisational connection reaching back two thousand years (Menon, 2016; The Jerusalem Post, 2026).

An Unresolved Grand Strategy

Returning to the three-way theoretical tension set out in Section 2, the evidence assembled in this paper favours the alliance-management and Karnad-style critical readings over unadorned structural realism. Pure balance-of-power logic predicts that India, facing a materially rising China, should be balancing against it; instead Section 10 documents India actively deepening economic ties with Beijing within days of the US tariff shock. Snyder's abandonment-entrapment framework and

Schweller's underbalancing thesis fit the record better: they predict, and the record shows, an India that avoids resolving its central alignment tension and instead manages it indefinitely (Snyder, 1997; Jervis, 1978; Schweller, 2004; Paul, 2005). Karnad's sceptical reading of "multi-alignment" as rhetoric that outpaces practice is also substantially borne out: Bharat Karnad's realist critique holds that India's declared strategic autonomy frequently outpaces its willingness to bear the economic and diplomatic costs that genuine non-alignment demands, a criticism the events of 2025–2026 — particularly India's eventual accommodation on Russian oil purchases under sustained American tariff pressure — appear substantially to vindicate (Karnad, 2018; Wikipedia, n.d.). This does not mean multi-alignment is empty rhetoric; it means the term describes, more accurately than official usage generally admits, a state optimising within a narrow menu of options rather than exercising unconstrained strategic choice — closer to Vital's older account of small- and middle-power constraint than to genuine great-power freedom of manoeuvre (Vital, 1967). The events of the period are therefore best understood not as confirmation of a settled doctrine but as a strategy of maximising optionality under conditions of chronic uncertainty, continuously renegotiated rather than fixed, whose sustainability depends on India's capacity to absorb external shocks it does not control (International Institute for Strategic Studies, 2026; East Asia Forum, 2026).

CONCLUSION

The USA–Iran conflict of 2025–2026 has functioned as an unusually revealing stress test of India's declared doctrine of strategic autonomy and multi-alignment. Quantitatively, it has exposed India's continued and substantial dependence on Gulf and Iranian energy and connectivity — a dependence that a single blocked chokepoint can convert into acute economic vulnerability within days. Diplomatically, it has accelerated the institutionalisation of India's partnership with Israel into a formally declared Special Strategic Partnership even as it simultaneously strained ties with

Washington to a degree unprecedented in the post–Cold War relationship. Geoeconomically, it has coincided with a tactical thaw with China that appears to owe as much to insuring against American unpredictability as to any genuine resolution of the underlying Sino-Indian territorial and strategic rivalry. Operation Sindoor, examined here as a discrete case study, demonstrated both the considerable operational maturity of India's relationship with Israel and the real limits of India's assumed standing in the wider West Asian theatre. None of this amounts to a wholesale repudiation of India's balancing strategy; if anything, the volatility of the period appears to have reinforced New Delhi's conviction that binary alignment would carry greater risk than the diplomatic and economic costs of continued hedging. But the record examined in this paper makes unmistakably clear that multi-alignment is not cost-free: it requires constant, high-stakes recalibration under pressure, and its long-term credibility depends on India's capacity to absorb simultaneous shocks — tariff wars, blocked chokepoints, and regional conflagrations not of its own making — that lie substantially outside its control. Future research would benefit from close empirical tracking of whether the February 2026 US–India trade reset and the SCO-anchored China thaw prove durable, or whether, as several of the sources surveyed here suggest, they represent only the current equilibrium point of a considerably longer and more volatile process of recalibration.

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