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India's Strategic Balancing Act — Navigating the US-Russia Triangle Amid Oil and Defence Dependencies

9 February 2026

SUBJECTS COVERED

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WHY IN NEWS

The US claimed India had agreed to stop buying Russian oil as part of a 2026 India-US trade understanding — a claim India did not publicly confirm — highlighting the acute pressure on India's multi-alignment doctrine as India-Russia trade reached **USD 68.72 billion** in 2024-25, predominantly driven by discounted Russian crude oil imports.

THE NUMBERS: HOW DEEP IS INDIA'S RUSSIA DEPENDENCY?

Trade (2024-25):

Total India-Russia trade: **USD 68.72 billion** — a dramatic rise from ~USD 11 billion in 2021-22, driven by Russian oil discounts post-Ukraine war sanctions

India's imports from Russia: **USD 63.84 billion** (of which crude oil accounts for the vast majority)

India's exports to Russia: **USD 4.88 billion** — pharmaceuticals, engineering goods, electronic components

The **structural imbalance** is stark: India imports 13× more from Russia than it exports

Energy dependency:

Russia became India's **largest single crude oil supplier** in 2023 — supplying approximately 35–40% of India's crude imports at deeply discounted prices (Urals crude trading at \$10–20/barrel discount to Brent)

India imports approximately **85% of its crude oil** requirements; disruption to Russian supply would require rapid market restructuring

Defence dependency:

Approximately **60% of India's active military inventory** is of Russian/Soviet origin

Key Russian platforms:

Su-30 MKI — the Indian Air Force's primary air superiority fighter; ~272 in service

T-90 Bhisma — main battle tank of the Indian Army; ~1,600+ in service

S-400 Triumph — advanced air defence system; 5 squadrons contracted, deliveries ongoing

Joint projects: **BrahMos Missile** (India-Russia JV; BrahMos Aerospace Pvt Ltd) — world’s fastest operational cruise missile (~2.8 Mach); supersonic version now in service, hypersonic variant in development

Kudankulam Nuclear Power Plant (Tamil Nadu): Built with Russian technical and financial collaboration; Units 1 and 2 operational; Units 3–6 under construction; total planned capacity: 6,000 MW

THE HISTORICAL FOUNDATION OF INDIA-RUSSIA TIES

Key milestones:

Treaty of Peace, Friendship and Cooperation (1971): The cornerstone agreement; provided implicit mutual security guarantees — USSR’s deployment of Pacific Fleet during the 1971 India-Pakistan War deterred potential US-China intervention

USSR supported India during the **1962 Sino-Indian War** — continued arms supplies despite India’s setback

USSR provided approximately **70% of India’s military equipment** during the Cold War era

Strategic Partnership declared (2000) under Putin-Vajpayee

Upgraded to “**Special and Privileged Strategic Partnership**” (2010) — the highest diplomatic designation in India’s foreign policy lexicon

2021-2031 Military-Technical Cooperation Agreement — a decade-long defence cooperation framework

Joint military exercises:

INDRA (Army) — long-running annual bilateral exercise

INDRA Navy — naval bilateral exercise

THE CURRENT STRATEGIC DILEMMA

US pressure and CAATSA:

The **Countering America’s Adversaries Through Sanctions Act (CAATSA, 2017)** mandates sanctions on countries making significant defence purchases from Russia

India’s S-400 purchase (USD 5.5 billion, contracted 2018) triggered CAATSA applicability — the US has issued waivers to India to date, but these are not unconditional or permanent

The US claim that India committed to halt Russian oil purchases represents a new pressure vector — using trade concessions as leverage for strategic realignment

Why India cannot easily disengage from Russia:

Defence dependency takes decades to unwind: Replacing 60% of military inventory requires sustained investment, technology transfer agreements, training overhaul, and long lead times. India's defence indigenisation (LCA Tejas, AMCA, Arjun MK1A) is progressing but is years from fully replacing Russian platforms

Energy economics: Russia's discounted crude saves India billions annually in import bills — abandoning it would increase India's energy costs significantly at a time of fiscal stress

Nuclear cooperation: Kudankulam cannot be easily replaced; Russia's ROSATOM remains one of only a handful of companies capable of building large nuclear power plants

Diplomatic leverage: India's relationships with both the US and Russia give it **mediation potential** — a purely pro-Western India loses its credibility as a neutral interlocutor in conflicts involving Russia

Why pure pro-Russia alignment is also unsustainable:

Russia's economy is becoming **deeply dependent on China** post-sanctions — raising the risk that Russia becomes a Chinese satellite power, undermining India's strategic interests

US-India convergence on Indo-Pacific security, China containment, and technology supply chains is strategically valuable and growing

Quad membership (India, US, Japan, Australia) and **iCET (Initiative on Critical and Emerging Technologies)** framework deepen India-US technology, AI, semiconductor, and defence cooperation

INDIA'S MULTI-ALIGNMENT DOCTRINE — THE THEORETICAL FRAMEWORK

India has historically rejected formal alliances in favour of **strategic autonomy** — the freedom to act independently in foreign policy decisions based on national interest rather than bloc loyalty.

This was articulated as **Non-Alignment** during the Cold War (NAM — Non-Aligned Movement, founded 1961 with India, Yugoslavia, Egypt, Ghana, Indonesia). Post-Cold War, India's doctrine evolved into **multi-alignment** — actively building relationships with multiple major powers simultaneously rather than passive non-alignment.

Multi-alignment in practice:

Quad (security, Indo-Pacific) + **BRICS** (economic, multipolar)

SCO (Shanghai Cooperation Organisation — security dialogue with China and Russia) + **I2U2** (India, Israel, UAE, US — economic/technology)

IPEF (Indo-Pacific Economic Framework with US) + bilateral defence with Russia

The India-Russia-US triangle tests whether multi-alignment has limits — specifically, whether economic coercion by the US can force India off its independent position.

UPSC RELEVANCE

India-Russia trade 2024-25 (USD 68.72 billion; imports USD 63.84 billion), Su-30 MKI, T-90 Bhishma, S-400 Triumph (5 squadrons), BrahMos (~2.8 Mach), Kudankulam NPP (Tamil Nadu, ROSATOM, 6 units planned), CAATSA 2017, Treaty of Peace Friendship and Cooperation 1971, Special and Privileged Strategic Partnership (2010), INDRA exercise, Quad, iCET, SCO, BRICS, NAM (founded 1961).

*India's multi-alignment doctrine; strategic autonomy; India-Russia-US triangle; CAATSA and India's defence procurement; Act East vs. Russia relationship balance. **GS-3:** India's energy security; defence indigenisation; nuclear power; BrahMos JV.*

★ FACTS CORNER — KNOWLEDGE PEDIA

INDIA-RUSSIA TRADE (2024-25):

Total: **USD 68.72 billion** (up from ~USD 11 billion in 2021-22)

India's imports from Russia: **USD 63.84 billion** (mostly crude oil)

India's exports to Russia: **USD 4.88 billion**

Russia became India's **largest single crude supplier** (~35-40% of crude imports)

INDIA'S RUSSIAN MILITARY INVENTORY:

~**60%** of India's active military inventory is Russian/Soviet

Su-30 MKI: Primary IAF air superiority fighter; ~272 in service

T-90 Bhisma: Indian Army main battle tank; 1,600+ in service

S-400 Triumph: 5 squadrons contracted (USD 5.5 billion, 2018); deliveries ongoing

JOINT PROJECTS:

BrahMos: India-Russia JV (BrahMos Aerospace); ~**2.8 Mach**; world's fastest operational cruise missile

Kudankulam NPP: Tamil Nadu; **ROSATOM** (Russia); Units 1-2 operational; Units 3-6 under construction; planned total: **6,000 MW**

KEY HISTORICAL MILESTONES:

Treaty of Peace, Friendship and Cooperation: **1971**

Strategic Partnership declared: **2000**

"Special and Privileged Strategic Partnership": **2010**

2021-2031 Military-Technical Cooperation Agreement

JOINT MILITARY EXERCISES:

INDRA (Army); **INDRA Navy** (Navy)

CAATSA:

Full form: **Countering America's Adversaries Through Sanctions Act (2017)**

Mandates sanctions for significant defence purchases from Russia

India received waivers for S-400 purchase

INDIA-US TRADE:

Bilateral trade: **USD 128 billion** (India runs surplus)

iCET: Initiative on Critical and Emerging Technologies (India-US framework)

OTHER RELEVANT FACTS:

NAM (Non-Aligned Movement): Founded **1961**; founding members: India (Nehru), Yugoslavia (Tito), Egypt (Nasser), Ghana (Nkrumah), Indonesia (Sukarno)

India's crude import dependence: ~**85%**

India's Strategic Petroleum Reserve (SPR): ~5.33 million MT at Vishakhapatnam, Mangaluru, Padur

Russia's economy increasingly China-dependent post-2022 sanctions — a growing Indian strategic concern

Sources: Drishti IAS, Next IAS

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