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**EDITORIAL ANALYSIS**

# India's Strategic Tightrope — Navigating the Russia-US Triangle Without Losing Balance

 **INDIAN EXPRESS**

9 February 2026

**SUBJECTS COVERED****IR** **SECURITY & DEFENCE****GS PAPERS****GS2****CURATED & WRITTEN BY****Bharat Choudhary**

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MAINS RELEVANCE:




## INTERVIEW ANGLE

*"How does India balance its relationships with the US and Russia? Is multi-alignment still a viable doctrine in a world increasingly demanding binary choices?"*

## WHY IN NEWS

The US publicly claimed India had agreed to stop purchasing Russian crude oil as part of bilateral trade negotiations — a claim India declined to confirm publicly — bringing India's multi-alignment doctrine under intense scrutiny as India-Russia trade reached USD 68.72 billion in 2024-25.

## THE PRESSURE POINTS ARE CONVERGING

India is navigating a foreign policy environment that is growing less forgiving of ambiguity. The US claim — made public, creating diplomatic pressure without a private agreement — represents a new pressure vector: using the promise of trade concessions as leverage to reshape India's strategic partnerships. This is qualitatively different from earlier CAATSA-era pressure, which was at least governed by a statutory framework with defined waivers. What is emerging now is ad hoc economic coercion layered on top of geopolitical expectations.

The challenge is real. India-Russia trade has ballooned from approximately USD 11 billion in 2021-22 to USD 68.72 billion in 2024-25 — a 6x increase in three years, almost entirely driven by discounted Russian crude oil. Russia now supplies approximately 35–40% of India's crude oil requirements. This dependency did not exist at this scale before the Ukraine war. India opportunistically — and rationally — filled the gap left by Western sanctions. But it is now structurally exposed.

## THE GEOMETRY OF INDIA'S STRATEGIC DEPENDENCIES

The case for maintaining the Russia relationship rests on three overlapping pillars.

**Defence:** Approximately 60% of India's active military inventory is of Russian or Soviet origin. This is not a statistic that changes in a budget cycle or two. The Su-30 MKI — India's primary air superiority platform with ~272 in service — requires Russian spares, avionics updates, and maintenance protocols. The T-90 Bhisma (1,600+ in service) forms the backbone of India's armoured strength. The S-400 Triumf, acquired for USD 5.5 billion, provides layered air defence that no other available system can immediately replicate. And BrahMos — a joint India-Russia venture producing the world's fastest operational cruise missile — is now part of India's strategic export portfolio. Severing the Russia relationship does not eliminate these platforms; it hollows out their operational readiness.

**Energy:** Discounted Russian crude has saved India hundreds of crores in import costs at a time when inflation management is a political priority. India imports ~85% of its crude requirement. A sudden pivot away from Russian crude would require rapid market restructuring — buying from the Gulf, US, or Africa at market rates — with direct impact on fuel prices and the current account deficit.

**Nuclear:** Kudankulam Nuclear Power Plant in Tamil Nadu, built with Russian technical and financial collaboration, has Units 1 and 2 operational and Units 3–6 under construction — a planned total of 6,000 MW. ROSATOM (Russia's state nuclear energy corporation) remains one of a handful of companies globally capable of constructing large-scale nuclear power plants. Replacing this partnership mid-construction is not feasible.

## THE CASE FOR THE US RELATIONSHIP IS ALSO COMPELLING

The countervailing forces are equally structural.

India-US bilateral trade stands at USD 128 billion — nearly double India-Russia trade. The iCET (Initiative on Critical and Emerging Technologies) framework covers AI, semiconductors, quantum computing, and advanced defence systems — technologies that determine the trajectory of India's economic growth over the next 30 years. Quad membership anchors India in the Indo-Pacific security architecture with the US, Japan, and Australia. The US technology ecosystem — from GE jet engines to potential TSMC partnerships — is indispensable to India's defence indigenisation ambitions.

And there is a structural concern about Russia itself. Post-2022 Western sanctions, Russia's economy is becoming deeply dependent on China. A Russia that is effectively a junior partner in China's geopolitical orbit is not the same strategic partner India cultivated during the Cold War. The USSR that deployed its Pacific Fleet in 1971 to deter Chinese and US intervention in the Bangladesh Liberation War was a genuine superpower. A Russia subordinated to Beijing represents a very different calculation for New Delhi.

## MULTI-ALIGNMENT: DOCTRINE UNDER STRESS, NOT DOCTRINE INVALIDATED

The critics of multi-alignment argue that it is essentially a euphemism for hedging — that India enjoys the benefits of both relationships while bearing none of the costs of commitment. This critique has merit in peacetime but misses the strategic logic: India's credibility as a potential mediator, its ability to exercise

independent foreign policy judgment, and its resistance to becoming a subordinate ally of any bloc are all functions of its maintained independence.

The Non-Aligned Movement (NAM, founded 1961 by Nehru, Tito, Nasser, Nkrumah, and Sukarno) articulated this logic for a post-colonial world. Post-Cold War, India evolved this into active multi-alignment — simultaneously building Quad (security, Indo-Pacific), BRICS (economic, multipolar), SCO (Eurasian dialogue), and I2U2 (India-Israel-UAE-US technology) partnerships. The framework is not passive neutrality; it is strategic optionality.

What is new is the intensity of pressure. The US is leveraging market access — an implicit threat to deny or condition trade benefits — to pressure India on the Russia relationship. This is a departure from the post-9/11 era when US-India convergence was pursued largely on India's terms. India must now navigate not a bipolar Cold War but a de facto US-China bipolar rivalry in which both poles want India in their corner.

## WHAT INDIA MUST DO

India's response must be strategic, not reactive. It requires:

**Accelerating defence indigenisation** — not as a long-term aspiration but as an urgent operational priority. LCA Tejas MkII, AMCA, Arjun Mk1A, and the indigenous submarine programme must move from project timelines to operational deployment. The goal is to reduce the 60% Russian dependency below 40% within a decade.

**Diversifying energy supply** — building Strategic Petroleum Reserves (currently ~5.33 million MT at Vishakhapatnam, Mangaluru, Padur — about 9.5 days of consumption), expanding US LNG imports, and accelerating renewable energy deployment to reduce the structural dependency on any single crude supplier.

**Maintaining diplomatic ambiguity on record** — India need not confirm or deny the US claim about Russian oil. Silence is itself a form of strategic communication. India's external affairs machinery has decades of experience managing this ambiguity.

**Building the institutional case for multi-alignment** — India must frame its position not as obstruction to Western goals but as a contribution to global stability. An India that maintains relationships with Moscow creates diplomatic channels that pure Western bloc-membership cannot. This is a public good, not free-riding.

The pressure will not diminish. But the right response to pressure is strategic clarity about what India's national interest requires — not the paralysis of being caught between two powerful partners, and not the subordination of strategic autonomy to economic temptation.

## UPSC RELEVANCE

*CAATSA 2017 (Countering America's Adversaries Through Sanctions Act), India-Russia trade USD 68.72 billion (2024-25), Su-30 MKI, T-90 Bhisma, S-400 Triumph (5 squadrons), BrahMos (~2.8 Mach, India-Russia JV), Kudankulam NPP (Tamil Nadu, ROSATOM, 6,000 MW planned), Treaty of Peace Friendship and Cooperation 1971, iCET (Initiative on Critical and Emerging Technologies), Quad, NAM (founded 1961), India-US bilateral trade USD 128 billion, India's Strategic Petroleum Reserve (~5.33 million MT).*

*India's multi-alignment doctrine; strategic autonomy; India-Russia-US triangle; CAATSA and waiver mechanisms; India's foreign policy framework (NAM to multi-alignment). **GS-3:** India's energy security; defence indigenisation; nuclear energy cooperation.*

★ **FACTS CORNER — KNOWLEDGEPEDIA**

**INDIA-RUSSIA TRADE (2024-25):**

Total: **USD 68.72 billion** (up from ~USD 11 billion in 2021-22 — 6× increase)

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

India's exports to Russia: **USD 4.88 billion** (pharmaceuticals, engineering goods)

Trade structural imbalance: India imports **13×** more from Russia than it exports

Russia now 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 Triumf:** **5 squadrons** contracted; USD 5.5 billion (2018); deliveries ongoing

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

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

**KEY TREATY MILESTONES:**

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

Strategic Partnership: **2000**

Special and Privileged Strategic Partnership: **2010**

2021-2031 Military-Technical Cooperation Agreement

Joint exercises: **INDRA** (Army), **INDRA Navy** (Navy)

**INDIA-US TRADE AND FRAMEWORKS:**

Bilateral trade: **USD 128 billion**

iCET (Initiative on Critical and Emerging Technologies): AI, semiconductors, quantum, advanced defence

Quad members: India, USA, Japan, Australia

**MULTI-ALIGNMENT FRAMEWORK:**

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

**SCO** (Eurasian dialogue with Russia and China) + **I2U2** (India-Israel-UAE-US, technology)

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

NAM founded **1961**: Nehru (India), Tito (Yugoslavia), Nasser (Egypt), Nkrumah (Ghana), Sukarno (Indonesia)

**INDIA'S ENERGY SECURITY:**

Crude import dependence: ~**85%**

Strategic Petroleum Reserve: ~**5.33 million MT** (Vishakhapatnam, Mangaluru, Padur) ≈ 9.5 days consumption

Sources: Indian Express, The Hindu

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