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# India's Strategic Autonomy Under Pressure: The Iran War and Multi-Alignment Stress Test

THE HINDU

15 May 2026

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# India's Strategic Autonomy Under Pressure: The Iran War and Multi-Alignment Stress Test

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## INTERVIEW ANGLE

*"If the US-Israel-Iran conflict forces India to choose between energy security (Iran/Russia oil) and alliance management (QUAD, G7 pressure), what does that reveal about the limits of strategic autonomy?"*

## EDITORIAL SUMMARY:

The Hindu argues that the escalating US-Israel-Iran conflict is the most serious test of India's strategic autonomy in decades. American economic and diplomatic pressure on India – to reduce Russian oil imports, distance itself from Iran, and step back from BRICS de-dollarisation – is colliding with India's core foreign policy doctrine of multi-alignment. The editorial warns that India's European pivot (Netherlands, Nordic summit, Italy) offers only limited strategic cushion because European nations tend to align with the US under pressure, leaving India with hard choices and diminishing room.

## THE CONTEXT – US-ISRAEL-IRAN ESCALATION (WEST ASIA, 2026)

- Iran's nuclear programme passed a critical threshold in late 2025; US-Israel military action (airstrikes on Iranian nuclear facilities) began in **April 2026**
- **Strait of Hormuz:** Iran's Revolutionary Guard threatened closure; tanker insurance premiums spiked; WPI Fuel & Power in India rose **+24.71 per cent YoY** by April 2026
- **India's exposure:**
  - India imports approximately **85 per cent** of its crude oil; significant portions from Gulf states and discounted Russian crude
  - India has historical energy and diplomatic ties with Iran dating to the **Chabahar Port** agreement

- India is a signatory to the **JCPOA** process (2015); historically opposed unilateral US sanctions on Iran

## THE STRATEGIC AUTONOMY DOCTRINE – INDIA’S CORE POSITION

India’s **strategic autonomy** (also called **multi-alignment**) holds that India will:

- 1 Engage all major powers simultaneously
- 2 Not join formal military alliances (unlike AUKUS or NATO)
- 3 Prioritise national interest over bloc loyalty
- 4 Maintain independent positions at multilateral forums

This doctrine has allowed India to buy discounted Russian oil post-Ukraine invasion, maintain Chabahar ties with Iran despite US sanctions, participate in QUAD, and deepen ties with the US.

## THE PRESSURES BUILDING

### From the US and G7

- **OFAC (Office of Foreign Assets Control)** secondary sanctions: any entity trading with sanctioned Iran risks US market exclusion
- US pressure on India to reduce Russian crude purchase volumes (India went from near-zero to ~40 per cent of imports being Russian since 2022)
- G7 diamond ban on Russia: already outside KP (covered separately); broader de-SWIFT pressure
- **QUAD**: US urging India to take harder positions on Iran and China

### From the Russia-China-Iran Bloc

- BRICS de-dollarisation agenda: India is being urged to support INR-Rouble-Renminbi trade settlements
- Russia’s continued oil supply at discount requires India not to impose its own sanctions
- Iran seeks Indian investment in Chabahar and Farzad-B gas field – delayed due to US pressure

### India’s Response So Far

- India has maintained **strategic ambiguity** – not condemning the US strikes, not sanctioning Iran
- **Abstained** at UNSC votes on Iran (procedural matter)
- Continued Chabahar port operations (partially; US granted a narrow waiver for Chabahar specifically)

- Continued discounted Russian oil purchases while signalling willingness to discuss alternatives

## THE EUROPEAN PIVOT – LIMITED CUSHION

PM Modi’s five-nation tour (UAE, Netherlands, Sweden, Norway, Italy – May 15-20) is partly a strategic diversification signal:

- **Netherlands:** Technology (ASML, semiconductors); green hydrogen; water management
- **Nordic nations:** Defence tech, Arctic cooperation, renewable energy
- **Italy (EU):** G7 engagement; IMEC (India-Middle East-Europe Corridor) progress

However, The Hindu’s editorial argues this pivot has limits:

- European nations (Netherlands, Norway, Italy) are **NATO members** and ultimately align with US positions under crisis pressure
- The **India-EU FTA** negotiations have stalled repeatedly; Europe’s export controls on dual-use technology (semiconductors, aerospace) mirror US restrictions
- Europe’s own energy dependency on the US LNG supply (post-Russia sanctions) means Europe cannot be a reliable counterweight to US pressure

## INDIA-IRAN RELATIONS – KEY PILLARS

PILLAR	STATUS (2026)
Chabahar Port	Operational; US carveout from sanctions; India Ports Global (IPGL) operating
Farzad-B Gas Field	Delayed; ONGC Videsh still unable to sign agreement due to US pressure
India-Iran bilateral trade	Sharply reduced post-2018 JCPOA withdrawal; limited rupee-rial settlements
INSTC (International North-South Transport Corridor)	Chabahar is southern anchor; connects India to Central Asia via Iran-Russia route

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### Key arguments:

- Strategic autonomy is India's defining foreign policy posture; but autonomy is not cost-free – it requires navigating contradictory pressures
- The West Asia conflict puts pressure on three simultaneous Indian interests: energy security (crude imports), economic security (US market access), and strategic independence (BRICS, Chabahar, Iran ties)
- India's BRICS chairship in 2026 creates additional tension: India must lead a forum that includes Russia and Iran while managing US expectations

### Counterarguments:

- Strategic autonomy has delivered tangible benefits: discounted Russian crude, QUAD membership, EFTA TEPA, Chabahar carveout
- India's scale makes it indispensable to all blocs – leverage exists even without choosing sides
- The five-nation tour itself demonstrates India's ability to simultaneously engage QUAD partners (US-facing) and BRICS members

**Keywords:** Strategic autonomy, multi-alignment, Strait of Hormuz, Chabahar Port, JCPOA, OFAC secondary sanctions, BRICS de-dollarisation, QUAD, INSTC, Farzad-B gas field, India-Iran relations.

*The Hindu's argument is essentially a warning: strategic autonomy worked well in a world with clear but manageable tensions between the US and Russia/China. The 2026 West Asia crisis is qualitatively different because it directly threatens India's energy supply chain while simultaneously triggering US pressure to make explicit choices. India's challenge is not just diplomatic skill but structural – the country's dependence on hydrocarbon imports from politically unstable regions makes genuine autonomy expensive. The editorial's implicit prescription: accelerate domestic clean energy and strategic reserves to reduce the external energy leverage that limits strategic freedom.*

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