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EDITORIAL ANALYSIS

# India-UAE: The Energy Security Pivot and Its Diplomatic Cost

INDIAN EXPRESS

16 May 2026

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# India-UAE: The Energy Security Pivot and Its Diplomatic Cost

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The Indian Express

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## INTERVIEW ANGLE

*"How does India balance its energy security dependence on Gulf states (UAE, Saudi Arabia) with its historically neutral stance on West Asia conflicts -- and what does the May 2026 UAE strategic deepening signal about the limits of India's multi-alignment doctrine?"*

## EDITORIAL SUMMARY:

Indian Express argues that PM Modi's May 15, 2026 UAE visit – yielding a Strategic Defence Framework, a 30-million-barrel SPR MoU with ADNOC, and implicit Indian solidarity with the US-Israel position on Iran – represents a calibrated but consequential pivot. India's energy security imperative is driving it closer to the Gulf Arab states, but at the cost of narrowing its diplomatic space with Iran, deepening I2U2 interdependence with Washington, and testing the neutrality claim that underpins India's Global South leadership.

## WHAT CHANGED IN MAY 2026

PM Modi's UAE visit (May 15, 2026) yielded several agreements that go beyond routine bilateral goodwill:

AGREEMENT	STRATEGIC SIGNIFICANCE
<b>ISPRL-ADNOC MoU</b> (30 mn barrels SPR)	Locks in UAE as India's primary emergency oil security partner
<b>IOCL-ADNOC LPG deal</b>	UAE already supplies ~40% of India's LPG; renewed long-term deal extends dependency
<b>Strategic Defence Cooperation Framework</b>	Formalises defence industrial and technology cooperation – distinct from previous general friendship frameworks
<b>USD 5 billion investment commitments</b>	ADIA→NIIF, IHC→Sammaan, Emirates NBD→RBL – deepens financial interdependence
<b>Cochin Shipyard-Drydocks World MoU</b>	Ship repair cluster at Vadinar – defence logistics cooperation

Taken together, these agreements move India-UAE from a **Comprehensive Strategic Partnership** (formalised in 2017) to something closer to a **quasi-alliance relationship** – particularly in the defence and energy security domains.

## THE IRAN PROBLEM

The deepening UAE partnership creates friction with India-Iran relations:

### The Historical Context

India-Iran ties have strategic depth:

- **Chabahar Port** – India's answer to Pakistan's Gwadar; gives India direct access to Afghanistan and Central Asia bypassing Pakistan
- **INSTC (International North-South Transport Corridor)** – connects India to Russia and Central Asia via Iran
- **Historical diaspora ties** – India's Parsi community traces roots to Iran
- **Cultural diplomacy** – Persian literary and artistic heritage in India

### The 2026 Rupture Points

- 1 **Farzad-B gas field:** India's ONGC Videsh was excluded from developing this Farsi block gas field – Iran awarded development to its domestic Petropars in May 2021 after decade-long delays due to US sanctions pressure. India has not recovered this position.

- 2 **Chabahar sanctions waiver lapsed:** The narrow US waiver that had allowed India’s Chabahar port operations expired in April 2026 – India’s operations are now in a legal grey zone, subject to OFAC secondary sanctions risk.
- 3 **BRICS split on West Asia:** At the BRICS FM meeting (May 14-15), India as chair was unable to secure a joint statement on the Iran conflict – Iran and Russia blocked paragraphs India wanted; India issued a Chair’s Statement instead, which carries less diplomatic weight.

**The editorial’s point:** By deepening the UAE relationship – including a Strategic Defence Framework that implicitly aligns India with the Gulf Arab position on Iran – India has used up diplomatic capital with Tehran that it had carefully accumulated over decades.

## INDIA’S ENERGY SECURITY ARCHITECTURE – THE DEPENDENCY MAP

SUPPLIER	INDIA’S CRUDE IMPORT SHARE	HORMUZ ROUTE?
Iraq	~22%	Yes
Russia	~15-20%	No (Black Sea/pipeline)
Saudi Arabia	~16%	Yes
UAE	~7%	Yes
Kuwait	~5%	Yes
Iran	~0% (sanctions)	Yes (historically)
USA	~5%	No

India’s **Hormuz dependency is structural** – approximately 50-55% of its crude imports transit the Strait even without Iranian supply. A sustained Hormuz disruption would be an existential economic shock.

The UAE SPR MoU is a rational response to this risk. But the editorial argues that **energy security through political alignment** is different from energy security through supply diversification, stockpiling, or renewables transition – and only the latter is durable.

## THE I2U2 DIMENSION

The **I2U2 grouping (India-Israel-UAE-USA)** – launched in 2022 – positions India as part of a US-backed West Asian security architecture:

- Joint investment projects (food security, clean energy, infrastructure)

- Implicit alignment of members against Iranian influence in the region
- Direct linkage to Abraham Accords normalisation of Israel-Arab relations

**The editorial's concern:** I2U2 membership, combined with the UAE strategic deepening, means India is perceived in Tehran – and in Russia and China – as having chosen a side in the US-led regional order. This complicates India's ability to position itself as a **neutral mediator** and **Global South voice** on West Asia.

## UPSC MAINS ANALYSIS

### GS Paper 2 – International Relations

#### Key arguments:

- India's "strategic autonomy" doctrine faces its clearest test in West Asia – genuine autonomy requires the ability to say no to both US pressure (on Iran) and Gulf pressure (on Israel-Palestine)
- The I2U2 + UAE Strategic Framework represents a drift toward US-aligned architecture that constrains future optionality
- India's Chabahar/INSTC investment in Iran connectivity has strategic and economic value; allowing it to atrophy under sanctions pressure is a costly concession

### GS Paper 3 – Economy

- Energy security calculus: SPR expansion + UAE LPG deal vs. long-term renewable transition
- OFAC secondary sanctions and their chilling effect on Indian firms' Iran engagement

**Keywords:** I2U2, India-UAE CEPA, ISPL-ADNOC MoU, Chabahar Port, INSTC, OFAC secondary sanctions, strategic autonomy, multi-alignment, Hormuz, LPG import dependency, Farzad-B gas field.

*Indian Express identifies a structural tension at the heart of India's West Asia policy: India needs Gulf Arab energy to power its economy, but Gulf Arab energy comes with political strings that shrink India's strategic autonomy. The May 2026 UAE deepening is not a strategic mistake – it is a rational response to an energy emergency. But the editorial warns that rational short-term choices can accumulate into long-term strategic constraints. India's most valuable diplomatic asset in West Asia is its reputation as a non-aligned actor that neither side needs to fear. That asset is being spent down, one MoU at a time.*

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