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EDITORIAL ANALYSIS

The Iran Conundrum and the Balancing of India

THE HINDU

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CURATED & WRITTEN BY

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 **The Hindu** 4 July 2026 **GS2**

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THE LIFT LINE

The collapse of the Iran nuclear deal and two rounds of conflict over Iran’s nuclear sites have turned West Asia into a test of India’s **strategic autonomy** (<https://ujyari.com/terms/strategic-autonomy/>). With over 90 per cent crude import dependence, a Gulf diaspora of about 8.9 million and a strategic port at Chabahar, India cannot afford either bandwagoning or paralysis.

WHY THIS EDITORIAL MATTERS FOR YOUR EXAM

This is a live case study in balancing **energy security** (<https://ujyari.com/terms/energy-security/>), diaspora protection, connectivity and great-power competition, the essence of strategic autonomy.

GS Paper 2: India and its neighbourhood; **bilateral** (<https://ujyari.com/vocab/bilateral/>), regional and global groupings involving India or affecting India’s interests; effect of policies and politics of developed and developing countries on India’s interests; Indian diaspora.

Prelims angle: JCPOA, NPT safeguards, IAEA Board, **Chabahar Port** (<https://ujyari.com/terms/chabahar-port/>) and Shahid Beheshti terminal, INSTC, Strait of Hormuz versus Gulf of Oman, BRICS expansion, SCO, Operation Sindhu.

Mains angle: How India protects energy and diaspora (<https://ujyari.com/vocab/diaspora/>) interests while preserving autonomy; the “decline of the West” thesis; balancing US, Iran, Israel and Russia simultaneously.

BACKGROUND AND CONTEXT

The Joint Comprehensive Plan of Action (JCPOA) of 2015, between the P5+1 and Iran, capped Iranian uranium enrichment at 3.67 per cent. The United States withdrew in May 2018. Iran formally ended its JCPOA commitments in October 2025 and now enriches to 60 per cent. On 12 June 2025 the IAEA Board of

Governors declared Iran in breach of its NPT safeguards obligations.

Two distinct conflicts followed. The June 2025 “12-Day War” saw US strikes on Fordow, Natanz and Isfahan on 22 June 2025. A separate, larger US-Israel campaign began on 28 February 2026, with a ceasefire (<https://ujiyari.com/vocab/ceasefire/>) memorandum signed on 17 June 2026.

India’s stakes are concrete. About 8.9 million Indians live in the Gulf, sending home roughly \$135 billion in remittances in FY25. India’s crude import dependence exceeded 90 per cent in FY26. Operation Sindhu (June 2025) evacuated about 4,429 Indians from Iran and Israel.

THE CORE ARGUMENT / ISSUE

India’s official position: dialogue and de-escalation

India’s Ministry of External Affairs has consistently urged all parties to de-escalate, ensure civilians are not harmed and pursue a diplomatic solution through dialogue. Crucially, on 14 June 2025 India distanced itself from the SCO statement condemning the strikes, a deliberate (<https://ujiyari.com/vocab/deliberate/>) assertion of strategic autonomy: India will not be dragged into any bloc’s collective posture.

The Chabahar dilemma

Chabahar’s Shahid Beheshti terminal is operated by India Ports Global Ltd under a 10-year deal signed on 13 May 2024. It sits on the Gulf of Oman, outside the Strait of Hormuz (<https://ujiyari.com/terms/strait-of-hormuz/>), giving India a route to Afghanistan and Central Asia that bypasses Pakistan. But the US sanctions waiver for Chabahar lapsed on 26 April 2026, and Budget 2026 allocated no funds for the port, exposing how US-Iran hostility directly constrains Indian connectivity ambitions.

INDIA’S INTEREST	EXPOSURE	BUFFER
Energy	90 per cent-plus crude dependence	About 70 per cent of crude now sourced outside the Strait of Hormuz
Diaspora	About 8.9 million in the Gulf	Operation Sindhu evacuation capacity
Connectivity	Chabahar, INSTC (https://ujiyari.com/terms/inste/)	Waiver lapse and no Budget 2026 funds
Autonomy	Pressure to pick sides	Distanced from SCO statement

Energy insulation

India ended Iranian crude imports in May 2019. Today about 70 per cent of India’s crude comes from outside the Strait of Hormuz, a deliberate diversification that cushions, though does not eliminate, the risk of a chokepoint (<https://ujiyari.com/vocab/chokepoint/>) crisis. The INSTC, the 7,200 km India-Iran-Russia corridor born

of a 2000 agreement, still awaits its missing link, the Rasht-Astara railway.

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HOW TO THINK ABOUT THIS (ANALYTICAL FRAME)

Use the lens of strategic autonomy versus alignment pressure. India is simultaneously a partner of the US (Quad, defence), of Russia (arms, INSTC, BRICS) and of Iran (Chabahar, connectivity), while deepening ties with Israel and the Gulf monarchies. The “decline of the West” is a contested thesis: proponents point to **multipolarity** (<https://ujijari.com/terms/multipolarity/>) and BRICS expansion (now 10 to 11 members after Iran, Saudi Arabia and Indonesia joined); sceptics note the West’s continued military, financial and technological dominance. India’s stance is not to bet on either narrative but to hedge, keeping options open across all poles.

THE DIAGRAM IN WORDS

Picture India at the centre of a wheel, with spokes running to Washington, Moscow, Tehran, Tel Aviv and Riyadh. Each spoke carries a distinct interest: technology and markets from the US, arms and energy corridors from Russia, connectivity from Iran, defence and technology from Israel, and diaspora and remittances from the Gulf. Strategic autonomy is the hub that keeps all spokes taut without letting any single one pull the wheel off course.

WAY FORWARD

- Diplomatically insulate Chabahar by seeking a renewed, project-specific carve-out and pressing for INSTC’s Rasht-Astara link.
- Continue energy diversification so no single chokepoint can hold Indian supply hostage.
- Maintain evacuation readiness for the Gulf diaspora, building on Operation Sindhu’s lessons.
- Hold the line on strategic autonomy: engage all parties, sign onto no bloc’s condemnation, and champion diplomacy.

PYQ LINKAGE AND PRACTICE

Relevant PYQ threads: 2018 GS2 “The question of India’s Energy Security constitutes the most important part of India’s economic progress. Analyse...”; 2021 GS2 on India’s diaspora; 2017 GS2 on India-West Asia relations.

Practice question (15 marks, 250 words): “In a turbulent West Asia, India’s strategic autonomy is tested most severely by the tension between its Chabahar ambitions and US sanctions pressure.” Critically examine.

Sources: The Hindu (<https://www.thehindu.com/>)

Source: The Iran Conundrum and the Balancing of India — Ujijari.com | Free UPSC & State PCS Editorial Analysis

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