

India between aspiration and reality

Strategic ambiguity instead of leadership in US-Israeli war against Iran



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INTERVIEW

Annunthra Rangan, senior research officer at the Chennai Centre for China Studies in New Delhi, in this exclusive interview with Asghar Ghahremanpour, editor-in-chief of Iran Daily, provides a detailed analysis of India's performance during the US-Israeli war against Iran. The analysis is significant because it reveals the contradiction between India's aspirations to play a leadership role in the "Global South" and the on-the-ground realities of its foreign policy.

According to Rangan, instead of adopting a proactive and leadership-oriented approach, India chose a strategy of "strategic ambiguity" during this crisis and paid a heavy price for its international reputation. The clear faults with this diplomacy includes: condemning Iran's retaliatory strikes while remaining conspicuously silent on the initial US-Israeli attacks on Iran; ignoring Tehran's explicit request for coordination within the BRICS framework despite India holding the group's presidency; the Indian foreign minister's dismissive and insulting reaction to Pakistan's mediating role (labeling it a "broker nation"); and failing to protest the sinking of the Iranian frigate IRIS Dena by the US Navy — especially since that same frigate had participated in joint naval exercises with India.

From an energy security perspective, the war laid bare India's structural vulnerabilities with devastating speed. Before the war, the Strait of Hormuz supplied 41% of India's crude oil, 55% of its LNG, and 88% of its LPG imports. Following Iran's closure of the strait, India's LPG imports fell by over 45%, the average price of India's crude basket surged from \$69 to \$113 per barrel, and key industries — such as ceramics in Gujarat and restaurants in Mumbai — faced widespread shutdowns. In response, India was forced to secure a 30-day waiver from the United States to purchase Iranian oil — an action that clearly demonstrates New Delhi's energy decisions remain subject to US approval.

At the geopolitical level, Rangan highlights India's gradual marginalization from the region's core dynamics. With the institutionalization of the "Islamabad process" — mediated by Pakistan and backed by China's political and strategic weight — India was effectively excluded as a meaningful player. While China and Pakistan jointly launched a five-point peace initiative, India played no role in this effort and even ignored Iran's request for BRICS-coordinated action. India's investment in the strategic Chabahar Port was halted, the vital North-South Transport Corridor (INSTC) was paralyzed, and contrary to India's long-standing desire to reduce dependence on Pakistan, its alternative route failed precisely when it was needed most.

At the broader level of the international system, this analysis demonstrates that India's "multi-alignment" strategy — under which New Delhi sought



Indian Prime Minister Narendra Modi
REUTERS



Annunthra Rangan

to maintain strategic ties simultaneously with the US, Russia, Israel, and Iran — has in practice failed. Not only was India unable to use this crisis as an opportunity for strategic independence, but it has also become more dependent than ever on the US-led sanctions architecture. According to Rangan, India has moved away from its long tradition of independent foreign policy (rooted in the Non-Aligned Movement) toward a pro-imperialist alignment with the US-Israel axis — an alignment whose price has been the weakening of India's standing among emerging powers of the Global South and the relinquishing of strategic initiative to rivals such as China and Pakistan.

IRAN DAILY: During the war launched by the US and Israel against Iran, what was India's actual policy? Did India manage to maintain neutrality, or did it lean toward one side in practice? How do you evaluate the performance of Indian diplomacy in that period?

RANGAN: India practiced strategic ambiguity when the moment demanded strategic leadership and paid a reputational price for it. Indian PM Modi had visited Tel Aviv just 36 hours before the strikes began, signing defense agreements and elevating ties to a "Special Strategic Partnership". India condemned Iranian counter-strikes on Arab states but stayed conspicuously silent on the US-Israeli attacks. When the US Navy sank the Iranian frigate IRIS Dena, a ship that had just

participated in India's own naval exercises, New Delhi offered no protest, citing it as Sri Lanka's responsibility. India also ignored Tehran's request to coordinate a BRICS response, despite being the group's current chair, making it the only founding BRICS member not to condemn the attacks. The diplomatic cost was severe. Pakistan, alongside Turkey and Egypt, stepped in to mediate the cease-fire, a stinging humiliation for a country that aspires to Global South leadership. Rather than engaging constructively, External Affairs Minister Jaishankar dismissed Pakistan's role by calling it a "dalaal" (broker) nation. India's constraints were real. 85% oil import dependence, nine million diaspora workers in the Persian Gulf, and the Strait of Hormuz crisis driving domestic LPG shortages. But structural pressures explain the

caution, not the silence. Over all, India wanted to implement the multi-alignment strategy, which was a failure in the end.

What specific impact did this war have on India's energy security? Did India face fuel shortages, severe inflation, or supply chain disruptions? And did New Delhi use this crisis to diversify its energy sources (e.g., increasing imports from Russia, Venezuela, or tapping strategic reserves)?

The war exposed India's deep structural vulnerability with devastating speed. The Strait of Hormuz accounted for approximately 41% of India's crude oil imports, 55% of its LNG imports and 88% of its LPG imports during FY2026. When Iran closed the strait in early March, the consequences were immediate. India's LPG imports fell over

45% month-on-month to around 1.12 million tonnes in March 2026, down from 2.04 million tonnes in February. Long queues and delayed deliveries became common — with many households switching to kerosene, coal, and wood as stopgap measures. In Gujarat, the ceramics industry shut down; in Mumbai, many restaurants closed partially or fully.

The average price of India's crude basket surged from \$69 per barrel in February to \$113 per barrel in March. HSBC estimated a potential 25% shortfall in natural gas supply, which could reduce GDP growth by around 25 basis points if the crunch lasted a quarter.

New Delhi moved on several fronts simultaneously. Indian refiners resumed Iranian crude purchases for the first time since 2019, after Washington granted



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Sri Lanka Navy personnel assist Iranian sailors during a rescue operation after responding to a distress call from their vessel, the Iranian ship, IRIS Dena, in the Indian Ocean, on March 4, 2026. The ship was hit by a torpedo inside India's maritime neighbourhood.
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