

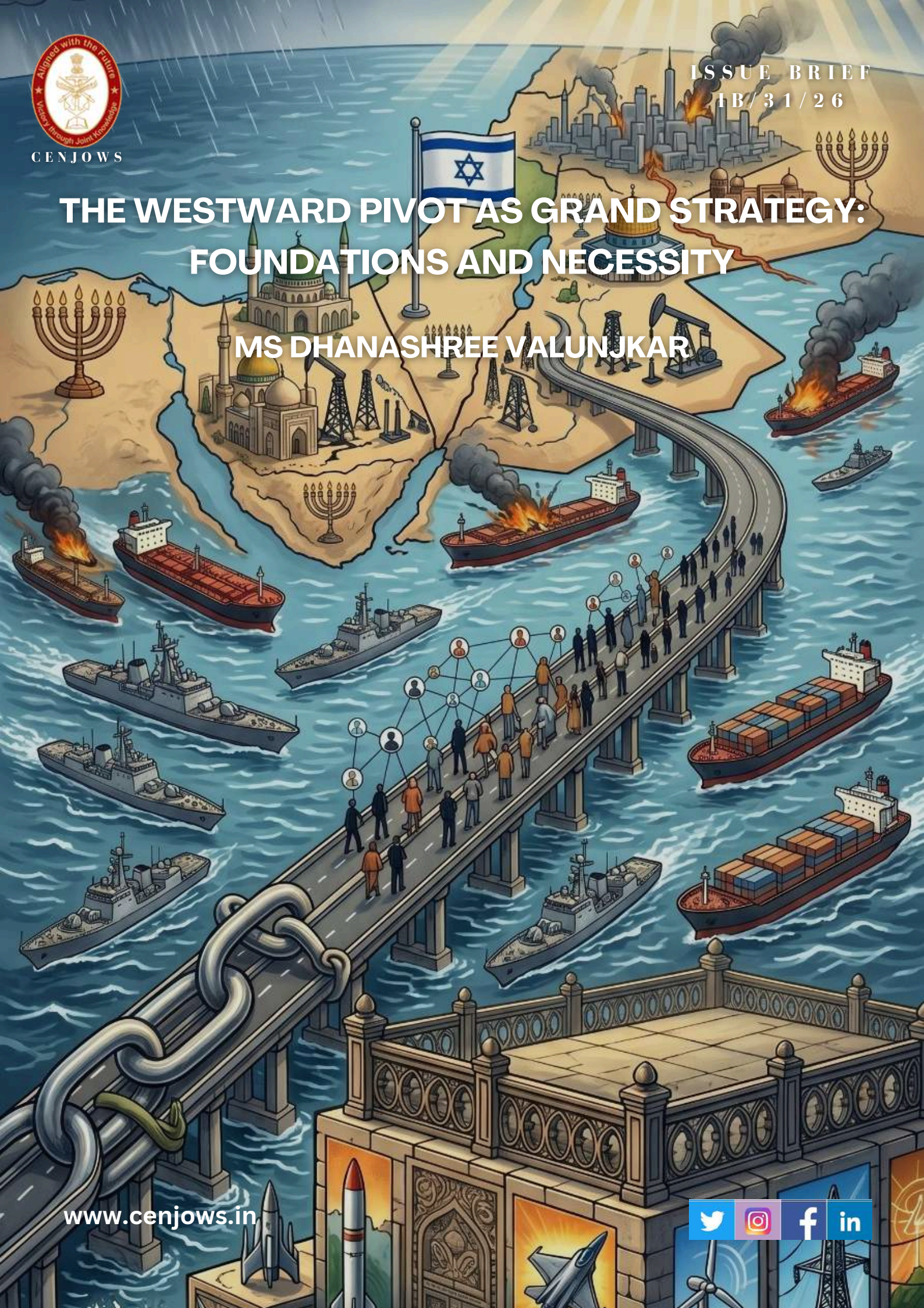


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THE WESTWARD PIVOT AS GRAND STRATEGY: FOUNDATIONS AND NECESSITY

MS DHANASHREE VALUNJKAR



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Ms Dhanashree Valunjkar is a research assistant at CENJOWS

Abstract

India's engagement with West Asia has undergone a transformation that transcends incremental policy adjustment. This paper traces the historical arc of India's West Asia policy from the ideologically anchored posture of the Nehruvian era through Cold War pragmatism, the 1991 systemic rupture, cautious re-engagement under successive governments, and the 'Look West' formulation of the Manmohan Singh years, to argue that the post-2014 'Link West' doctrine under Prime Minister Narendra Modi constitutes a qualitative strategic rupture. Drawing on structural realism and the emerging literature on multi-alignment, the chapter demonstrates that this rupture was driven not by ideological preference but by structural necessity: India's accelerating energy dependence, a nine-million-strong diaspora in the Gulf, maritime vulnerabilities along critical sea lanes of communication, the imperative of counter-terrorism cooperation, and the growing challenge posed by China's expanding strategic footprint in the region. This paper positions India's Westward Pivot as an exercise in grand strategy by a rising power, one that seeks not hegemony but the role of a systemic balancer capable of simultaneously engaging rival regional actors. It establishes the foundational logic upon which the paper's central theme, the 'Atmanirbhar Guardrail' doctrine, linking indigenous defence and energy capability to diplomatic resilience, is constructed. The 2023-2026 period of cascading regional crises, from the Israel-Hamas war to Strait of Hormuz tensions, serves as the acid test validating the strategic necessity of this pivot.

Keywords: Link West policy, Strategic rupture, Multi-alignment, Strategic autonomy, Energy security, Atmanirbhar Bharat

Introduction: Framing the Westward Pivot

For the better part of seven decades after independence, India's relationship with West Asia was defined by a paradox. The region was indispensable to India's economic survival, supplying the bulk of its hydrocarbons, hosting millions of its citizens, and generating tens of billions of dollars in annual remittances, yet New Delhi treated it as a policy afterthought, a space to be managed rather than shaped. Where India pursued deliberate strategic architectures in Southeast Asia ('Look East', later 'Act East') and cultivated a nuclear-armed deterrent posture toward its continental neighbours, its approach to West Asia remained reactive, episodic, and burdened by ideological inheritances that long outlived their utility.¹

This paper argues that the post-2014 period marks a decisive departure from that pattern, which it terms a strategic rupture rather than mere policy evolution. The evolution from 'Look West' to 'Link West' and eventually 'Think West' is not merely a rhetorical makeover but signals a fundamental rethinking of where West Asia sits within India's grand strategic calculus. This pivot was propelled less by choice than by necessity: the confluence of structural vulnerabilities, an energy dependence that now meets nearly 88 percent of India's crude oil needs, a diaspora numbering close to nine million, maritime chokepoints through which the lifeblood of the Indian economy passes, and a Chinese rival swiftly accumulating influence across the region together rendered strategic passivity untenable.²

The paper proceeds in five sections. The first traces the historical foundations of India's West Asia policy from Nehru to Manmohan Singh, identifying the ideological constraints and pragmatic adaptations that shaped six decades of engagement. The second examines the structural drivers of energy, diaspora, trade, and maritime security that created the necessity for a strategic pivot. The third analyses the post-2014 transformation as a qualitative shift, detailing the diplomatic innovations that distinguish 'Link West' from its predecessors. The fourth situates this pivot within the theoretical framework of grand strategy, drawing on structural realism and the concept of multi-alignment to explain India's emerging role as a systemic balancer. The fifth

examines how the cascading crises of 2023-2026 have stress-tested this strategic architecture. The conclusion lays the groundwork for the book's central argument: that the sustainability of the Westward Pivot ultimately depends on the 'Atmanirbhar Guardrail', the proposition that indigenous capability in defence, energy, and technology is the prerequisite for durable strategic agency in a volatile region.

Historical foundations: India's West Asia policy from Nehru to Manmohan Singh

- **The Nehruvian inheritance: solidarity over strategy (1947-1964)**

India's post-independence West Asia policy was rooted in anti-colonialism, Afro-Asian solidarity, and the moral architecture of non-alignment. Nehru's worldview treated West Asia primarily through an ideological lens as a space of decolonisation struggles with which India shared a civilisational and political kinship. India voted against the UN Partition Plan for Palestine in November 1947, proposed a federal state alternative, and in 1949 became the only non-Arab state to oppose Israel's admission to the United Nations³. Even after extending de jure recognition to Israel in September 1950, Nehru maintained a deliberate policy of 'recognition without relations,' permitting Israel only a consulate in Bombay while cultivating a strategic alliance with Gamal Abdel Nasser's Egypt that became a cornerstone of the Non-Aligned Movement⁴.

This posture was not purely idealistic. India's large Muslim population, the need for Arab support on Kashmir, and the Congress party's philosophical opposition to religion-based statehood, a calculus that was pragmatic beneath its moralist veneer. Yet the net effect was to subordinate India's emerging economic interests in the region, particularly its growing need for Gulf hydrocarbons, to a political framework that left New Delhi with limited leverage and no significant bilateral institutional architecture in the Gulf monarchies.

- **Oil shocks and the PLO years (1966-1989)**

The 1973 Organisation of the Petroleum Exporting Countries (OPEC) oil crisis exposed the structural vulnerability at the heart of India's engagement with West Asia. India's oil import bill quadrupled from \$414 million to a projected

\$1,350 million within a year, consuming roughly 40 percent of potential export earnings⁵. The resulting inflation, reaching 28 percent in 1974, contributed to the political upheavals that preceded the Emergency. Despite India's solidly pro-Arab diplomatic record, OPEC declined to offer developing nations preferential pricing.

Under Indira Gandhi, India deepened its ideological commitment to the Arab cause, becoming the first non-Arab country to recognise the Palestine Liberation Organisation in 1974, while simultaneously growing more dependent on Gulf energy supplies. The contradiction between political solidarity and economic vulnerability defined this era.

India's alliance with Ba'athist Iraq, a secular non-aligned state, served both ideological and energy security purposes, while labour migration to the Gulf, accelerating through the 1970s oil boom, created a new structural dependency. Remittances from overseas Indians grew from \$2.1 billion in 1990-91 to become a critical component of India's external accounts⁶. Rajiv Gandhi cautiously began recalibrating India's Israel posture, meeting Shimon Peres at the UN General Assembly in 1985, though no structural policy change followed.

- **The 1991 Systemic Rupture: From Ideology to Interest**

The Gulf War of 1990-91 shattered the premises on which India's West Asia policy had rested. Iraq's invasion of Kuwait on 2 August 1990 presented the V.P. Singh government with an impossible dilemma, choosing between its traditional alliance with secular, non-aligned Iraq and the realities of the US-led international order. As Meher Wadhawan has noted, Foreign Minister I.K. Gujral's embrace of Saddam Hussein in Baghdad came to be seen as 'an infamous symbol of India's weak-willed diplomacy'⁷.

The subsequent evacuation of more than 170,000 Indian nationals from Kuwait, the largest civilian airlift ever undertaken, carried out over 59 days, highlighted both the magnitude of the Indian diaspora's vulnerability and the country's operational capability to mount an effective response⁸.

Three concurrent developments transformed India's strategic calculus. First, the collapse of the Soviet Union eliminated India's primary external patron and rendered non-alignment a framework without an adversarial bipolarity to navigate, a limitation Gujral himself would later reflect on in his memoirs⁹.

Second, the 1991 balance of payments crisis, in which foreign exchange reserves dwindled to barely three weeks of import cover, compelled an economic liberalisation that required new foreign policy frameworks. Third, the Palestinians' own readiness to negotiate with Israel at the Madrid Peace Conference rendered India's anti-Israel stance, in P. R. Kumaraswamy's words, 'more Palestinian than Arafat'¹⁰.

Prime Minister P.V. Narasimha Rao's decision to establish full diplomatic relations with Israel on 29 January 1992 was, in Kumaraswamy's assessment, 'the most defining moment of India's post-Cold War foreign policy'¹¹. It inaugurated a process of de-hyphenation, treating Israel and Palestine as separate policy tracks that would become fully operationalised only two decades later. C Raja Mohan characterised Indian foreign policy in this period as having moved 'from the power of the argument to the argument of power', which captures the essence of the transition¹².

- **From Vajpayee to Manmohan Singh: Two Decades of Cautious Engagement (1998-2014)**

The BJP-led government under Atal Bihari Vajpayee accelerated the embrace of Israel. The 1999 Kargil War proved pivotal, wherein Israel supplied critical military hardware at short notice while other partners hesitated, cementing a defence relationship that by the 2010s would make Israel one of India's largest arms suppliers after Russia¹³. Ariel Sharon's 2003 visit to India, the first by an Israeli Prime Minister and the establishment of a joint anti-terror commission signalled that defence and counter-terrorism had become the primary drivers of the relationship.

Manmohan Singh's 'Look West' policy, formally launched in July 2005 at a meeting of the Trade and Economic Relations Committee, represented the first

attempt to construct a comprehensive framework for Gulf engagement. Singh declared the Gulf to be ‘part of our natural economic hinterland’ and authorised free trade negotiations with the GCC¹⁴. King Abdullah bin Abdulaziz Al Saud’s presence as Chief Guest at the 2006 Republic Day celebrations and the resulting Delhi Declaration calling for a ‘strategic energy partnership’ marked a symbolic high point¹⁵. Yet as Chaudhuri has observed, ‘nothing much came out’ of the Look West initiative: ‘Unlike South East Asia, where a strong mechanism for regional cooperation existed in the form of ASEAN, there was no institutional framework in the Middle East that could routinise India’s engagement’.¹⁶

The Look West period was characterised by genuine intent but structural limitations: a traditional buyer-seller energy relationship, diaspora welfare concerns managed bureaucratically rather than strategically, and a reluctance to engage in the region’s security dynamics. India continued to view West Asia through the narrow lens of the ‘3Es’: Energy, Expatriates, and Economic engagement without integrating these into a coherent strategic architecture.

Drivers of Necessity: Energy, Diaspora, Trade, and Maritime Security

The Westward Pivot was not a discretionary policy innovation. It was compelled by the accumulation of structural vulnerabilities that made India’s economic trajectory hostage to a region it had historically refused to strategically engage. Four interlocking drivers created the necessity for transformation.

- **Energy Security and West Asian Dependency**

India’s dependence on crude oil imports climbed from around 77 percent in 2013-14 to 87.7 percent in FY 2023-24, while the first ten months of FY 2025-26 registered a level of 88.5 percent¹⁷. Prior to Russia’s emergence as a discounted supplier in the wake of the Ukraine war, West Asian countries accounted for more than 60 percent of India’s crude imports, with Iraq, Saudi Arabia, the UAE, and Kuwait serving as the main sources¹⁸. Even following the diversification triggered by Russia, which pushed Moscow’s share up to 36-41 percent by 2024, West Asia continued to meet roughly 46 percent of India’s crude oil needs¹⁹. Qatar alone provides 47 per cent of India’s liquefied natural

gas imports, and nearly 90 per cent of India's LPG comes from the Middle East²⁰.

The Strait of Hormuz remains a critical chokepoint through which Parliamentary Standing Committee on Petroleum and Natural Gas reports December 2024 that over 60 per cent of India's crude oil is sourced from Persian Gulf countries²¹.

India's strategic petroleum reserves of 5.33 million metric tonnes spread across three sites, provide for approximately 9.5 days of crude coverage against an IEA-recommended 90-day benchmark, thereby offering limited insurance against sustained disruption²².

Each \$10 per barrel rise in oil prices broadens India's current account deficit by roughly 0.3-0.4 percent of GDP, turning energy price volatility into a direct risk to macroeconomic stability. India's yearly oil import bill has fluctuated between \$96 billion and \$137 billion in recent years, representing the largest single category of external spending²³.

- **Nine Million Strategic Assets: The Gulf Diaspora**

Around 8.9 million Indian nationals live in GCC countries, making up nearly one-third of India's worldwide overseas population of 32.1 million²⁴. This diaspora has historically contributed a significant portion of India's inward remittances, with the UAE alone accounting for 19.2 percent of remittance inflows in FY 2023-24, although the GCC's combined share has lately been surpassed by the United States, United Kingdom, and other advanced economies as migration trends have shifted toward higher-skilled employment²⁵.

India received \$118.7 billion in total inward remittances during FY 2023-24, while the World Bank projected inflows of approximately \$129 billion for calendar year 2024, sustaining India's standing as the largest remittance recipient globally²⁶. As Pethiyagoda's analysis noted, the Gulf was home to about seven million Indians generating remittances of nearly \$40 billion each year, a baseline figure that has approximately doubled over the following decade²⁷.

The diaspora also represents a vulnerability, as the 1990 evacuation from Kuwait illustrated. The welfare and security of nine million citizens generate an obligation of engagement that goes beyond the policy preferences of any individual government, rendering the diaspora not just an economic asset but a structural force shaping India's strategic footprint in the Gulf.

- **Trade, Investment, and Maritime Security: India's Structural Stakes in West Asia**

Bilateral trade between India and the GCC touched \$178.56 billion in FY 2024-25, representing 15.4 percent of India's overall global trade²⁸. India-UAE trade on its own surpassed the \$100 billion threshold, driven by the Comprehensive Economic Partnership Agreement signed in February 2022, which was India's first major free trade agreement in ten years and was negotiated in a record 88 days²⁹. Cumulative foreign direct investment from the UAE into India touched \$22.84 billion by March 2025, while Saudi Arabia's Public Investment Fund channelled \$2.8 billion into Reliance entities and reiterated a \$100 billion investment pledge in April 2025³⁰.

India-Israel defence relations are significant, with Israel having emerged as India's third-largest arms supplier behind Russia and France, contributing 13 percent of India's military hardware imports during 2020-24³¹.

Around 95 percent of India's trade by volume moves through sea routes, with three West Asian chokepoints the Strait of Hormuz, Bab el-Mandeb, and the Suez Canal constituting the arterial network of its external commerce³². The Indian Navy has sustained uninterrupted anti-piracy deployments in the Gulf of Aden since 2008 and initiated Operation Sankalp in June 2019 to safeguard Indian-flagged vessels passing through the Strait of Hormuz, the Persian Gulf, and the Gulf of Oman³³.

India's 2018 logistics access pact for Oman's Duqm port, strategically positioned in the Arabian Sea beyond the Strait of Hormuz chokepoint, exemplifies the type of infrastructure that translates maritime interest into operational capability³⁴.

The Indian Navy's self-conception as the 'net security provider' in the Indian Ocean Region makes West Asian maritime security an inherent national interest rather than an optional engagement³⁵.

The Strategic Rupture: 'Link West' Under Modi as a Qualitative Shift

The Vivekananda International Foundation's 2024 assessment captures a widely held view within India's strategic community: 'Until the advent of Prime Minister Narendra Modi's government, India-West Asia relations were largely transactional and devoid of any strategic component'³⁶. While this formulation perhaps undervalues the incremental work of predecessors, it identifies a real discontinuity. The post-2014 transformation differed from previous periods in four respects: the scale of personal diplomatic investment, the innovation of de-hyphenation as operational doctrine, the creation of new multilateral architectures, and the reconceptualisation of Gulf states as strategic partners rather than energy suppliers.

- **Modi's Gulf Diplomacy: A Prime Ministerial Imprint**

Prime Minister Modi visited the UAE seven times between 2015 and February 2024, travelled to Saudi Arabia twice in the same window (in April 2016 and October 2019, with a third visit following in April 2025), and became the first Indian Prime Minister to visit Israel in July 2017 and the first to visit Palestine in February 2018, the Israel trip consciously delinked from Ramallah in what has since been termed India's formal 'de-hyphenation' of the two relationships³⁷. His August 2015 UAE visit, the first by an Indian Prime Minister in thirty-four years, followed what Chaudhuri has described as a signal from the Abu Dhabi royal family of its desire for 'a genuinely strategic relationship, one that included long-term investments in India and a willingness to dilute ties with Pakistan'³⁸.

The conferral of Saudi Arabia's King Abdulaziz Sash in April 2016 and the UAE's Order of Zayed in August 2019, making Modi the first Indian Prime Minister to receive either nation's highest civilian honour, reflected the personal capital invested in these relationships³⁹. The inauguration of the Bochasanwasi Akshar Purushottam Swaminarayan Sanstha (BAPS) Hindu Mandir in Abu Dhabi in February 2024, built on twenty-seven acres gifted in 2015 by Sheikh

Mohamed bin Zayed (then Crown Prince of Abu Dhabi, now UAE President), symbolised the deepening of civilisational ties beyond transactional interests.⁴⁰

- **De-hyphenation as Operational Doctrine**

The most consequential innovation was the systematic de-hyphenation of India's regional relationships. Modi's standalone visit to Israel in July 2017, followed by a standalone visit to Palestine in February 2018, operationalised a principle that India's relationship with each actor would be pursued on its own merits. Simultaneously, India engaged Saudi Arabia (April 2016) and Iran (May 2016, for the Chabahar port deal) in quick succession, refusing to be constrained by the Saudi-Iran rivalry, treating each relationship as independent rather than zero-sum⁴¹.

This approach extended to India's engagement during the post-October 2023 regional crisis: New Delhi deepened defence ties with Israel while simultaneously sending \$29.53 million in humanitarian aid to Gaza, signing a ten-year Chabahar port agreement with Iran (May 2024), and concluding a Comprehensive Economic Partnership Agreement with Oman (December 2025)⁴². De-hyphenation thus, enabled India to maintain operational relationships with all major regional actors simultaneously, an achievement without precedent in Indian diplomatic history.

- **New multilateral architectures**

The post-2014 period saw India embedded in novel institutional frameworks that integrated West Asia into India's broader strategic architecture. The I2U2 grouping (India-Israel-UAE-US), formalised through a virtual leaders' summit on 14 July 2022, created a minilateral focused on food security, energy, and technology, with the UAE committing \$2 billion for integrated food parks in India⁴³.

The India-Middle East-Europe Economic Corridor (IMEC), announced at the G20 Leaders' Summit in New Delhi on 9 September 2023, proposed a ship-to-rail transit network connecting India to Europe via the UAE, Saudi Arabia, Jordan, and Israel, a direct counterweight to China's Belt and Road Initiative⁴⁴.

The India-Saudi Arabia Strategic Partnership Council, established in 2019, and the January 2026 India-UAE Strategic Defence Partnership letter of intent added institutional depth to what had previously been an ad hoc engagement⁴⁵.

Grand Strategic Logic: Multi-Alignment, Strategic Autonomy & Systemic Balancer

The Westward Pivot is best understood not as an isolated regional policy but as one dimension of an emerging Indian grand strategy. Kenneth Waltz's structural realism provides the theoretical scaffolding: in an anarchic international system, states distinguished primarily by their capabilities must ensure survival through self-help, balancing power through internal capacity-building and external alignment⁴⁶. For India, a rising power that imports a large percentage of its crude oil through contested waterways, hosts the world's largest diaspora in a volatile region, and faces a peer competitor (China) actively expanding influence in its extended neighbourhood, the structural imperative for West Asian engagement is not a policy preference but a systemic constraint.

- **From Non-Alignment to Multi-Alignment**

India's foreign policy doctrine has traversed three distinct phases. Non-Alignment, conceived by Nehru as a framework for navigating Cold War bipolarity, gave way after 1991 to strategic autonomy, the preservation of decision-making independence without the ideological apparatus of the Non-Aligned Movement. The post-2014 period has witnessed the emergence of what Ian Hall terms multi-alignment: 'essentially a compromise strategy' that enables simultaneous engagement with multiple, often rival, partners⁴⁷.

External Affairs Minister S. Jaishankar's formulation in *The India Way* is the doctrinal touchstone: 'This is a time for us to engage America, manage China, cultivate Europe, reassure Russia, bring Japan into play, draw neighbours in, extend the neighbourhood, and expand traditional constituencies of support'⁴⁸. His observation that 'there will be convergence with many but congruence with none' captures the essence of India's West Asia approach, maintaining deep

bilateral relationships with Israel, Iran, Saudi Arabia, and the UAE despite the contradictions among them.⁴⁹

- **India as Systemic Balancer**

Ashley Tellis's Carnegie Endowment assessment, drawing on an earlier U.S. Central Intelligence Agency judgment that India was likely to become 'the most important swing state in the international system,' points to India's structural position. Yet the Modi government's ambition exceeds the swing-state designation. In the same analysis, Tellis documents Foreign Secretary S. Jaishankar's July 2015 IISS Fullerton Lecture declaration that India 'aspires to be a leading power, rather than just a balancing power,' a reconceptualisation of India's role that reflects Modi's own call to 'shed old mindsets' in favour of leadership rather than mere equilibrium⁵⁰.

In the West Asian context, India's approach constitutes what international relations theory terms '*hedging*': insurance-seeking behaviour under conditions of high uncertainty, characterised by an insistence on not taking sides, the pursuit of opposite or contradicting measures to offset multiple risks, and an inclination to diversify and cultivate a fallback position. India has constructed a triangular architecture of engagement in which Gulf monarchies anchor energy security and investment, Israel anchors defence technology and intelligence cooperation, and Iran was to provide continental connectivity through Chabahar to Central Asia. This architecture is designed not to maximise power in the offensive realist sense but to minimise vulnerability, the defensive realist objective of security through diversification⁵¹.

Rajesh Rajagopalan's analysis of India's strategic choices is instructive here: for a rising power facing a far stronger regional rival, the country's six broad grand-strategic options, nonalignment, hedging, internal balancing, regional balancing, alignment with China, and closer alignment with the United States, carry different costs, and internal balancing remains, in Rajagopalan's judgment, a necessary if ultimately insufficient component of any credible response. India's inclination toward developing indigenous defence capabilities instead of joining formal alliances mirrors Rajagopalan's point that any alliance

involves a degree of lost autonomy, since it necessitates reliance on partners who may turn out to be unreliable, a structurally sound reluctance for a country whose strategic culture has long valued freedom of manoeuvre.⁵²

- **China Factor as Structural Accelerant**

China's growing presence in West Asia has shifted India's engagement from a desirable policy enhancement to a pressing strategic imperative. What sets Beijing's Gulf approach apart is its integrated nature, diplomatic convening power, commercial capital, infrastructure ownership, digital networks, and military basing fused into what Jonathan Fulton has described as 'dense interdependence' that no single Indian tool can offset, a presence operating simultaneously across every dimension of statecraft.⁵³

The Saudi-Iran rapprochement of March 2023, mediated in Beijing, offered the clearest illustration of this asymmetry. Despite possessing deeper civilisational links to both Riyadh and Tehran, India was unable to match China's convening power. The episode exposed a structural shortcoming: diplomatic ties, no matter how longstanding, do not automatically convert into strategic leverage when a rival has entrenched itself more comprehensively.⁵⁴

The commercial foundation supporting that leverage is substantial. Bilateral trade between Saudi Arabia and China reached around \$107 billion in 2023. BRI investments permeate the region, with \$5.5 billion flowing into Saudi Arabia in 2022 alone, a 35-year concession granted to China Ocean Shipping Company at Khalifa Port, and a reported \$400 billion, 25-year Comprehensive Strategic Partnership signed with Iran⁵⁵. Jon Alterman's framing is analytically sharp: these form a parallel architecture that provides Gulf monarchies with a hedge against reliance on any single patron, without openly challenging the US-anchored security order⁵⁶. The same diversification rationale shapes how these states manage their ties with India, meaning India has to compete within a setting structurally engineered to preclude exclusive alignment.

The military dimension transforms this commercial heft into a latent power projection capability. The PLA Support Base at Djibouti, featuring an extended

pier capable of berthing aircraft carriers and a standing garrison of up to 2,000 personnel, marks Beijing's first formal military presence west of the Malacca Strait⁵⁷. US intelligence reporting of a covert dual-use facility under construction at Khalifa Port in 2021 illustrated what Alterman terms the 'infrastructure-to-basing pathway': deepwater commercial ownership convertible into military capacity on a timeline that a regional crisis can dramatically compress⁵⁸.

Between 2016 and 2020, Chinese arms transfers to Saudi Arabia jumped by 386 percent, breaking into the UAV and ballistic missile segments where US export controls bar Washington from competing⁵⁹. At the same time, Huawei has obtained commercial 5G contracts with established operators throughout all six GCC states, building a digital infrastructure presence that extends across both civil and military communications networks⁶⁰.

For India, the strategic ramifications are systemic in nature rather than episodic. The India-Middle East-Europe Economic Corridor (IMEC), unveiled at the G20 Summit in September 2023 as an explicit counter-BRI framework, was put on hold within weeks of its launch due to the regional crisis that erupted after October 2023⁶¹.

The asymmetry this revealed is not circumstantial but structural in nature. China's foothold in West Asia is built on dual-use infrastructure that gains strategic value during periods of conflict. India's counter-architecture, by contrast, relies on corridors that cannot operate amid wartime disruptions. It is this asymmetry, more than any individual Chinese capability, that elevates the Westward Pivot from diplomatic ambition to what Rajesh Rajagopalan would characterise as a problem of internal balancing, one whose solution lies in the indigenous capability base required to sustain strategic presence, not merely in the diplomatic relationships that presence is meant to support⁶².

Regional Volatility as Acid Test: 2023-2026

The cascading crises that began on 7 October 2023 have subjected the Westward Pivot to its most severe stress test. The results confirm both the sophistication of India's multi-alignment doctrine and the hard ceiling of a hedging strategy pursued without commensurate structural capacity. Hamas's attack on Southern Israel, killing approximately 1,200 Israelis, triggered a chain of escalation encompassing Hezbollah's northern front, the Houthi maritime campaign, and three successive rounds of direct Israel-Iran military confrontation in April 2024, October 2024, and June 2025⁶³. Critically, these crises overlapped rather than succeeded one another, activating, simultaneously, each of the structural vulnerabilities this paper has traced.

- **The Red Sea Crucible**

The Houthi campaign constitutes the first systematic non-state interdiction of a primary global trade artery since the 1984-88 Tanker War. Over 190 attacks by October 2024 drove container freight rates on the JNPT-Rotterdam Lane from \$650 to \$3,750 per forty-foot equivalent within a single month, a 477 percent increase⁶⁴.

Approximately 95 percent of India's Europe and US East Coast-bound cargo was rerouted around the Cape of Good Hope, adding 10-14 days of transit alongside substantially elevated fuel and insurance costs. Basmati rice exports, the overwhelming share of which transit West Asian waters, faced freight cost increases of up to fivefold⁶⁵. What the freight data obscure is the asymmetric character of the disruption: a non-state actor armed with a few hundred drones and missiles imposed a structural tax on an economy exceeding \$3.7 trillion. India's response operationalised multi-alignment. The Indian Navy deployed over 30 warships on rotation in the Arabian Sea and Gulf of Aden, its largest sustained extra-regional naval presence since the 1990-91 Kuwait evacuation, escorting more than 230 merchant vessels carrying cargo valued at over \$4 billion⁶⁶.

New Delhi declined to join the US-led Operation Prosperity Guardian, routing its response instead through the pre-existing Operation Sankalp framework. This was doctrine, not reticence. As Darshana Baruah has argued, India's

preferred strategic identity is as an autonomous Indian Ocean security provider, a posture incompatible with enlistment in a coalition that would have compromised its standing with Tehran and with the Global South constituency cultivated through the 2023 G20 presidency⁶⁷.

Pant and Bommakanti's analysis captures the posture precisely: India's deployment was undertaken 'with significantly greater purpose than at any time since 2008,' explicitly outside the US-UK coalition framework, prioritising anti-piracy and escort operations as an autonomous security provider⁶⁸. It held under stress, but only because the Navy's institutional capacity, developed over fifteen years of continuous deployments, was available to carry the operational load the diplomatic posture presupposed.

- **The Hormuz Spectre**

The April and October 2024 Israel-Iran exchanges, including the launch of over 170 drones, 30 cruise missiles, and 120 ballistic missiles in the first round, and approximately 200 ballistic missiles in the second, converted the Strait of Hormuz closure scenario from planning abstraction into live contingency⁶⁹. The June 2025 US precision strikes on Fordow, Natanz, and Isfahan intensified the calculus further; Iran's Supreme National Security Council reportedly considered, and ultimately rejected, a Strait closure as a retaliatory instrument⁷⁰. The crisis consolidated a structural truth that decades of diversification rhetoric had obscured: Hormuz still carries over 60 per cent of India's crude imports and nearly 90 per cent of its LPG, against a strategic petroleum reserve of 5.33 million tonnes offering approximately nine days of coverage, against the IEA-benchmarked ninety.

India's response combined diplomatic de-escalation overtures, including direct Modi-Pezeshkian exchanges, with accelerated naval deployments of approximately 23 warships to the Gulf of Oman and Persian Gulf by early 2026, and a systematic diversification of crude sources that raised Russian discounted barrels to 36-41 per cent of the import basket⁷¹. Yet the ceiling of the hedging architecture was unmistakable. No individual bilateral relationship, with Iran, the UAE, Saudi Arabia, or Israel, could substitute for the underlying

structural condition: India cannot unilaterally secure a chokepoint through which the bulk of its crude must transit. The simultaneous disruption of Hormuz, Bab el-Mandeb, and the Red Sea exposed the foundational fragility of a strategy built on maritime corridors that India can observe, escort, and lobby about, but cannot independently police.

- **Diplomatic Balancing Under Fire**

The Israel-Palestine dimension tested de-hyphenation at its point of maximum strain. Prime Minister Modi's initial October 2023 response, condemning terrorism and expressing solidarity with Israel without mentioning Palestine, marked the furthest India had travelled from its historical pro-Palestinian posture and drew immediate criticism from the Global South constituency the government had itself carefully cultivated⁷². The subsequent recalibration, \$29.53 million in humanitarian assistance to Gaza, support for UN General Assembly ceasefire resolutions, and reaffirmation of the two-state solution were not a reversal but rebalancing within the de-hyphenation framework⁷³.

That India could simultaneously deepen ties with Israel, expand engagement with the Arab Gulf, and maintain backchannels to Iran validated Jaishankar's 'convergence with many, congruence with none' formulation. Ian Hall's observation remains analytically sharp, however: India's strategic multi-vectorism carries costs that scale with its ambition; each triangulated partnership now demands more active, more individualised, and more politically expensive management than the doctrine's architects initially priced in⁷⁴.

The 2023-2026 stress test does not invalidate multi-alignment. It clarifies its load-bearing conditions. Diplomatic agility without commensurate structural resilience in maritime security, energy infrastructure, and indigenous capability is a temporary dividend, not a durable strategy. The Westward Pivot, as a grand strategy, must be built on both.

Conclusion: Laying the Foundation for The Atmanirbhar Guardrail

The historical trajectory traced in this paper reveals a pattern of escalating structural dependency punctuated by crisis-driven adaptation. From Nehru's ideological solidarity through the oil shocks of the 1970s, the traumatic 1990-91 Gulf War, Narasimha Rao's pivotal Israel normalisation, and the incremental engagement of the Vajpayee and Manmohan Singh years, each phase exposed the gap between India's growing stakes in West Asia and its capacity to protect them.

The post-2014 transformation of the 'Link West' rupture represents India's first systematic attempt to close that gap. Through unprecedented personal diplomacy, the de-hyphenation of inherited policy constraints, the creation of new multilateral architectures (I2U2, IMEC), and the reconceptualisation of Gulf states as strategic rather than merely transactional partners, the Modi government constructed an engagement framework commensurate with India's actual interests. Grounded in the structural realist logic that a rising power's survival depends on securing its critical dependencies, and operationalised through the multi-alignment doctrine that enables simultaneous engagement with rival actors, the Westward Pivot constitutes a genuine exercise in grand strategy by a state that aspires to be a leading rather than merely a balancing power.

Yet the 2023-2026 stress test has also exposed the pivot's central vulnerability: India's strategic agency in West Asia remains fundamentally constrained by its import dependence. India that imports 88 percent of its crude oil, relies on foreign-origin defence platforms for critical military capabilities, and depends on external maritime corridors for 95 percent of its trade by volume cannot sustain the role of systemic balancer indefinitely on diplomatic skill alone. The hedging architecture triangulating between Gulf monarchies, Israel, and Iran functions effectively under moderate regional stress but faces potential collapse under the kind of systemic conflict that a Strait of Hormuz closure or a wider West Asian war would represent.

This is precisely where the 'Atmanirbhar Guardrail' doctrine proposes that India's indigenous capability in defence manufacturing, energy diversification (including solar, green hydrogen, and expanded strategic petroleum reserves), and cybersecurity creates the structural resilience necessary to sustain the Westward Pivot through periods of extreme regional volatility. The chapters that follow will demonstrate how

domestic industrial capacity functions as a force multiplier for external diplomacy, how, in the language of structural realism, internal balancing enables the external balancing strategy that the Westward Pivot embodies. The foundations and necessity have been established. What remains is to show how the guardrails are being built.

DISCLAIMER

The paper is the author's individual scholastic articulation and does not necessarily reflect the views of CENJOWS, the Defence forces, or the Government of India. The author certifies that the article is original in content, unpublished, and it has not been submitted for publication/ web upload elsewhere and that the facts and figures quoted are duly referenced, as needed and are believed to be correct.

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