



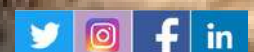
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THE WEST ASIA QUAGMIRE: INDIA'S ENERGY VULNERABILITIES AND FOREIGN POLICY CHALLENGES BY DR MANJARI SINGH

ORGANISED BY CENJOWS
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**THE WEST ASIA QUAGMIRE: INDIA'S ENERGY VULNERABILITIES AND
FOREIGN POLICY**

DR MANJARI SINGH

ORGANISED BY CENJOWS ON 30 JUL 2026

The guest lecture delivered by Dr Manjari Singh provided a comprehensive analysis of the evolving strategic relationship between India and West Asia, with particular emphasis on energy security, geopolitical developments, and the implications of regional instability for India's national interests. The session brought together scholars, military professionals, and researchers to deliberate on the growing strategic significance of the Gulf region and its centrality to India's economic growth and security architecture.

The lecture began by highlighting the enduring importance of West Asia in India's foreign and energy policy. Dr Singh described the India-West Asia relationship as fundamentally symbiotic, noting that while India remains heavily dependent on the Gulf region for its energy requirements, the Gulf countries equally value India as a reliable energy consumer, investment destination, and strategic partner. She emphasised that fluctuations in regional geopolitics often have immediate consequences for global energy markets, exposing structural vulnerabilities in India's external energy architecture.

A major focus of the lecture was the strategic importance of maritime security, particularly the Strait of Hormuz, through which a substantial proportion of the world's oil supplies transit. Dr Singh examined how Iran's long-standing claims over the Strait, coupled with the activities of non-state actors such as the Houthis, have increased the risks to maritime trade and energy transportation. She observed that even limited disruptions or political signalling in the region can trigger significant volatility in global oil prices, making secure sea lines of communication an essential component of India's energy security strategy.

The lecture further explored India's efforts to mitigate these vulnerabilities through a strategy of energy diversification. Dr Singh highlighted India's agreement with the UAE's ADNOC to store approximately 30 million barrels of crude oil in Indian strategic

petroleum reserves, alongside long-term LNG agreements and increased crude imports from Russia. Although these alternative sources entail higher transportation costs, she argued that such measures represent calculated and necessary adjustments aimed at reducing dependence on any single supplier while ensuring continuity of energy supplies during periods of geopolitical uncertainty.

She also traced the historical evolution of India-Gulf relations, identifying three distinct phases in the partnership. The first phase was characterised primarily by transactional energy ties during India's industrial expansion. The second phase witnessed deeper economic integration following the economic reforms of 1991, driven by trade, investment, and the growing Indian diaspora in the Gulf. The contemporary phase, she explained, reflects a mature strategic partnership shaped by multipolar geopolitics, expanding economic cooperation, and shared interests in regional stability, while energy continues to remain the foundation of bilateral engagement.

The discussion also examined the impact of changing regional alignments on India's strategic interests. Dr Singh analysed Saudi Arabia's evolving diplomatic outreach towards countries such as Turkey and Syria, the stalled prospects of Saudi-Israeli normalisation, and the broader political transformations taking place within the Gulf. These developments, she noted, have implications for regional connectivity initiatives, including the India-Middle East-Europe Economic Corridor (IMEC), and underscore the complexity of safeguarding critical maritime routes and trade corridors that are vital to India's long-term strategic and economic objectives.

Looking ahead, Dr Singh stressed the importance of adopting a comprehensive and forward-looking energy security strategy. She advocated greater multilateral cooperation to secure maritime chokepoints, enhanced partnerships with like-minded countries, and sustained investments in renewable and non-fossil fuel energy sources. These initiatives, she argued, are essential for achieving India's long-term ambitions of becoming a developed economy while meeting its commitment to net-zero emissions by 2070. She concluded by emphasising that energy security should be viewed not merely as an economic necessity but as a critical pillar of India's national security and strategic autonomy.

In conclusion, the lecture underscored the increasingly complex interplay between geopolitics, energy security, and maritime stability in shaping India's strategic

environment. It highlighted the need for diversified energy partnerships, resilient supply chains, strengthened regional cooperation, and sustained investment in emerging energy technologies. The session offered valuable insights into the evolving dynamics of West Asia and reinforced the importance of strategic planning in ensuring India's energy resilience and long-term national security.