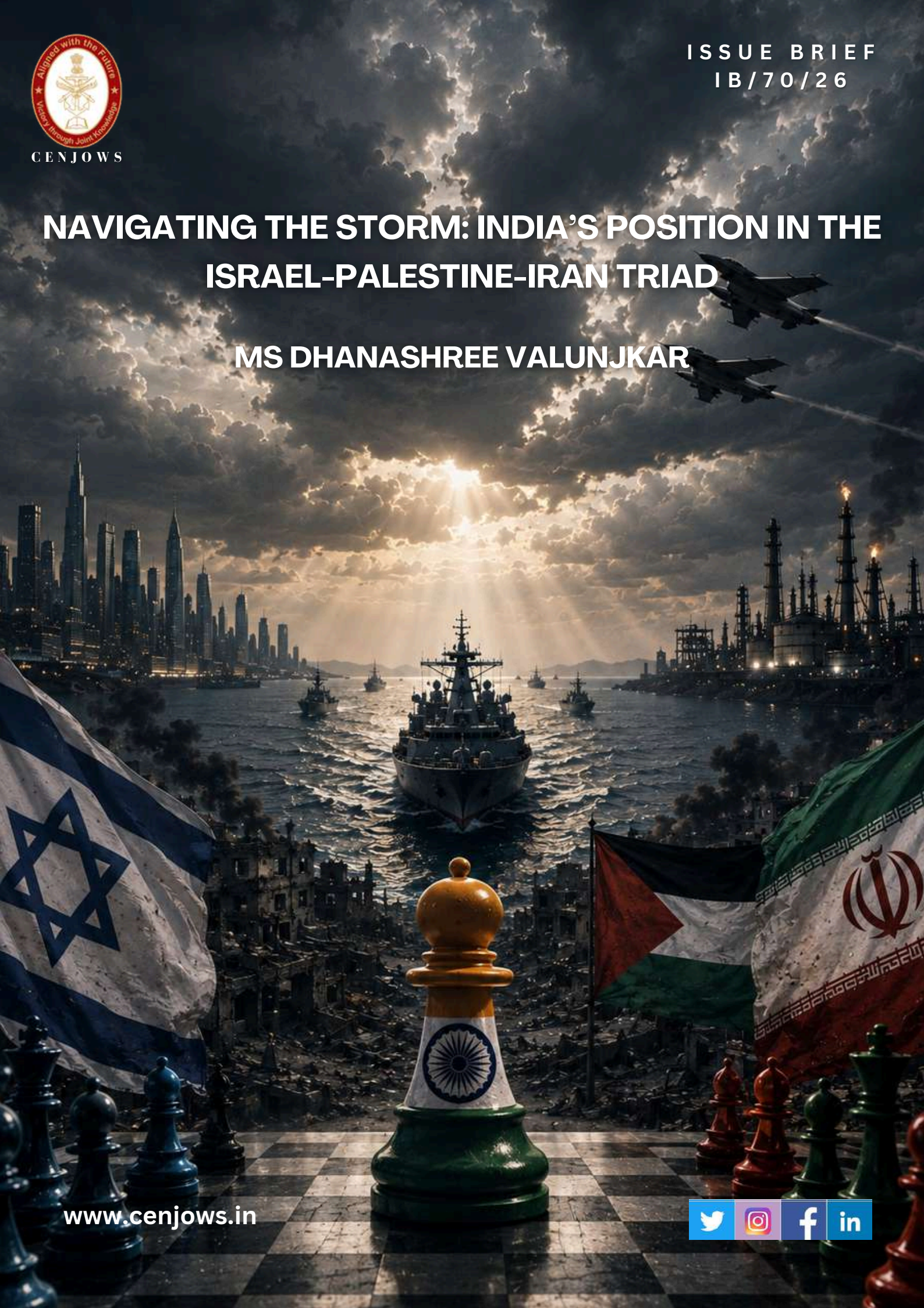


NAVIGATING THE STORM: INDIA'S POSITION IN THE ISRAEL-PALESTINE-IRAN TRIAD

MS DHANASHREE VALUNJKAR





CENJOWS

Navigating the Storm: India's Position in the Israel-Palestine-Iran Triad



Ms Dhanashree Valunjkar is a
Research Assistant at CENJOWS

Abstract

The 2026 war on Iran did to India's West Asia policy what no white paper could: it converted a set of doctrinal assumptions into a live test. When United States and Israeli strikes killed Iran's Supreme Leader on 28 February 2026, and Tehran responded by restricting and then closing the Strait of Hormuz, India found its two most cherished regional propositions, that it could hold Israel, Iran and the Arab Gulf in simultaneous embrace, and that its energy lifeline could be secured without alignment, placed under direct strain. This paper argues that India's conduct during the crisis marks the maturation of its West Asia posture from reactive energy diplomacy into a structural commitment to maritime security provision, and that the two are causally linked. The diplomatic balancing that let New Delhi to keep channels open to Jerusalem, Tehran and the Gulf simultaneously was not sustained by rhetoric; it rested on the material capacity to protect its own shipping at the region's decisive chokepoint. Drawing on the classical theory of sea power and the chokepoint, on the literature concerning strategic autonomy and multi-alignment, and on the empirical record of Operation Sankalp and its dedicated successor Operation Urja Suraksha, the paper reconstructs the maritime response and reads it as the operational core of India's balancing act. It then traces the crisis into its second, harder phase, contested reopening, mined waters and Iranian transit charges, and identifies three structural fragilities that condition the model's durability, closing with six recommendations for the strategic and naval-policy community.

Keywords

Strait of Hormuz, sea lines of communication, Operation Sankalp, Operation Urja Suraksha, strategic autonomy, de-hyphenation, maritime security, net security provider, energy security, SAGAR/MAHASAGAR, chokepoint.

The Triad and the Chokepoint: A Doctrine Under Fire

For three decades, India cultivated a distinctive proposition in West Asia: that it need not choose. It could deepen a strategic partnership with Israel, sustain a civilisational and energy relationship with Iran, and build an increasingly dense economic partnership with the Arab Gulf, treating each relationship on its own merits rather than as a function of the others.¹ This is the policy of de-hyphenation, and by early 2026 it had become the organising principle of India's regional engagement.² What had rarely been asked was what would happen to the proposition if the region's actors went to war with one another.

That question was answered in the early hours of 28 February 2026. Three days after Prime Minister Narendra Modi became the first Indian leader to address the Knesset,³ and two days after the two governments announced the elevation of bilateral ties to a Special Strategic Partnership,⁴ the United States and Israel launched a coordinated campaign of strikes across Iranian territory. Washington designated its component Operation Epic Fury; Israel's was announced as Roaring Lion.⁵ The opening salvo killed Supreme Leader Ali Khamenei and a large number of senior officials, and the region crossed a threshold it had approached for years: from proxy conflict to open interstate war.⁶ Iran retaliated under Operation True Promise IV with missile and drone barrages against Israel, against United States bases in the Gulf, and against Arab states hosting American forces, and it reached for the instrument that most directly implicated India, the Strait of Hormuz.

The strait is the hinge on which India's energy security turns. Roughly a fifth of global petroleum liquids consumption transits the thirty-three-kilometre-wide channel between Iran and Oman, the bulk of it bound for Asia; the International Energy Agency records that in 2025 nearly fifteen million barrels per day of crude alone, about a third of global seaborne crude trade, moved through it.⁷ For India, the exposure is acute and specific. Before passage was restricted in early March 2026, an estimated forty-

five per cent of India's crude imports, roughly half of its liquefied natural gas and close to ninety per cent of its liquefied petroleum gas passed through Hormuz.⁸ The Carnegie Endowment's assessment of the crisis records that global crude moved from an average near seventy dollars a barrel in February 2026 to almost one hundred and twenty dollars in March, an unambiguous demonstration of how a single waterway can transmit a distant war into Indian households and factories.⁹

The human dimension was equally immediate. Addressing the Lok Sabha on 9 March, External Affairs Minister S Jaishankar noted that roughly one crore Indians live and work in the Gulf, that the ministry had established a dedicated control room, and that almost sixty-seven thousand Indian nationals had already returned home.¹⁰ The crisis was therefore never a purely naval problem; it was a whole-of-nation contingency in which consular evacuation, civil aviation, energy procurement and maritime escort had to be run concurrently.

This conjunction of a triad at war and a chokepoint closed frames the argument of this paper. The prevailing reading of India's crisis conduct treats the diplomatic balancing and the naval deployment as separate stories: one a tale of careful statements and abstentions, the other a matter of ship movements. The claim advanced here is that they are a single story. India's ability to keep faith with Israel, Iran and the Arab Gulf simultaneously through the most dangerous regional crisis in a generation was underwritten by its capacity to secure its own sea lines without leaning decisively on any external navy. Diplomacy bought the room; maritime capability paid for it. The paper proceeds in six further movements: the strategic-autonomy logic that governed the balancing (Section II); the theory of sea power and the chokepoint that give the maritime response its analytical weight (Section III); the empirical reconstruction of that response (Section IV); the harder second phase of the crisis after April (Section V); and a critical assessment of the model's fragilities (Section VI), before recommendations and conclusion.

The Balancing Act: Strategic Autonomy Under Fire

India's response to the war was, at the declaratory level, a study in calibrated ambiguity. New Delhi neither endorsed the strikes on Iran nor broke with Israel; it reiterated its longstanding support for a negotiated two-state outcome while preserving

the substance of its partnership with Jerusalem; and it kept working channels open to Tehran even as it deepened ties with the Arab Gulf capitals. The Ministry of External Affairs framed successive interventions around de-escalation, protection of civilians and a return to diplomacy rather than attribution of blame, a formulation it maintained through the summer.¹¹ This is the conduct that the scholarship on strategic autonomy and multi-alignment describes as India's signature: the deliberate refusal to convert partnership into alliance,¹² and the preservation of manoeuvre across rival relationships.¹³ Speaking at the Munich Security Conference days before the war began, the External Affairs Minister had put the underlying disposition plainly, describing strategic autonomy as something deeply embedded in India's history and cutting across its political spectrum.¹⁴

The theoretical distinction worth drawing here is between balancing as posture and balancing as capacity. Kautilya's Arthashastra, to which Indian strategic writing routinely returns, treats the pursuit of relative advantage among many powers not as neutrality but as active statecraft grounded in the ruler's own strength; the mandala of surrounding states is navigated from a position of material capability, not merely rhetorical even-handedness.¹⁵ This is precisely the register in which India's 2026 balancing must be read. Equidistance that cannot protect its own interests is a plea; equidistance backed by the capacity to secure one's shipping is a policy. The difference between the two, in the Hormuz crisis, is the Indian Navy.

The balancing was tested on three axes at once. With Israel, the challenge was to preserve a partnership only days old at its formal apogee without appearing to endorse a war that much of the Global South condemned; India managed this by declining to join in either the celebration or the condemnation, keeping its posture studiously functional. With Iran, the challenge was existential in the literal sense: Tehran controlled the valve on India's energy lifeline, and here New Delhi's decades of relationship investment, including the Chabahar port that gives India a stake in Iran's own connectivity ambitions, paid a concrete dividend, in that India was placed on Iran's list of nations permitted to transit the strait.¹⁶ With the Arab Gulf, the challenge was to reassure partners whose own infrastructure was under Iranian fire without being drawn into the conflict; India's dense economic integration with the Gulf, examined in the preceding chapter of this study, supplied the ballast.

An honest reading of the record must concede a qualification here, because it strengthens rather than weakens the argument. The passage list Iran announced was not a reward for naval capability alone: China, Russia, Iraq and Pakistan were named alongside India, and none of them had escorted their way onto it.¹⁷ Naval capacity did not compel the diplomatic outcome. What it did was determine what India could do with that outcome once secured. Permission to transit an active war zone is worth little to a merchant fleet that has no protected onwards passage, no route guidance through mined waters, and no naval presence to deter opportunistic attack on the far side. The two instruments were complements: diplomacy opened the gate, and sea power carried the cargo through it. The three axes were held not by a single grand gesture but by the steady demonstration that India's core interest, the safe transit of its energy, could be defended by India itself.

Sea Power, the Chokepoint and the Industrial Base

To read the maritime response as the core of India's balancing requires the analytical vocabulary of sea-power theory. The classical account, laid down by Alfred Thayer Mahan, holds that command of the sea is a foundation of national power and that such command is exercised above all at the narrow passages through which the world's trade is funnelled.¹⁸ The Strait of Hormuz is the archetype of the Mahanian chokepoint: a two-lane seaway whose closure can strand a fifth of the world's oil, and whose control confers strategic leverage out of all proportion to its width.¹⁹

Yet the aspect of Mahan's argument most pertinent to this paper is the one most often forgotten. Mahan insisted that naval preponderance is unsustainable without the commerce, the territorial infrastructure and, decisively, the industrial base that produces and sustains it; a fleet without an economy behind it withers.²⁰ This is the hinge on which this study's larger argument turns. The Atmanirbhar Guardrail doctrine advanced across these chapters holds that industrial and technological self-reliance is what allows Indian diplomacy to remain unconstrained by dependence. Mahan supplies the maritime corollary: the capacity to secure a chokepoint rest ultimately on the industrial and naval base that builds and sustains the fleet. India's ability to keep destroyers, frigates and logistics-support vessels on task east of Hormuz for weeks, drawn from an increasingly indigenous fleet, is the material expression of that doctrine at sea. It is also, at root, a jointness proposition: sustained distant-station operations

of this kind rest on maritime patrol and shipborne rotary-wing surveillance, on strategic lift for the parallel evacuation effort, and on the inter-service and inter-ministerial machinery that allocates them.

Sea-power theory has, moreover, broadened since Mahan in ways that fit India's conduct precisely. Julian Corbett insisted that maritime strategy is ultimately about the protection of one's own lines of communication and commerce rather than the annihilation of an enemy fleet;²¹ Ken Booth's influential trinity recast the roles of navies as simultaneously military, diplomatic and constabulary.²² India's Hormuz operation is best understood through Booth's lens: the same warships that provided military reassurance to Indian-flagged carriers also performed a diplomatic function, signalling India's arrival as a security actor in Gulf waters, and a constabulary one, protecting commerce against a diffuse threat environment of mines, drones and boarding parties. The deployment was not a preparation for battle but the exercise of sea power in its Corbettian and Boothian sense: the defence of sea lines of communication as an end in itself.

The Maritime Response: From Sankalp to Urja Suraksha

The instrument through which India acted was not improvised for the crisis; it was a standing mission activated to new intensity and then supplemented by a purpose-built successor.

- **The Standing Mission**

Operation Sankalp- Sankalp is Sanskrit for commitment was launched by the Indian Navy on 19 June 2019, following attacks on tankers in the Gulf of Oman, precisely to guarantee the safe transit of Indian-flagged vessels through the Strait of Hormuz.²³ From its inception, the operation was designed as a whole-of-government instrument, coordinated by the Navy with the Ministries of Defence, External Affairs, Shipping, and Petroleum and Natural Gas, and the Directorate General of Shipping. By 2021, it had committed more than twenty warships. It was providing safe passage to an average of sixteen Indian-flagged merchant vessels a day in the Gulf region, with a warship and an integral helicopter continuously deployed off Ra's al Hadd, in the Gulf of Oman and in

the Persian Gulf.²⁴ During the Red Sea and Houthi crisis of 2023-24, its scope was extended into the Central and North Arabian Sea and the Gulf of Aden.²⁵

- **The Escort Model Under Fire**

When the 2026 war closed the strait, this apparatus was turned to its founding purpose under the sharpest conditions it had faced. As the closure took hold, twenty-two Indian-flagged vessels carrying a combined crew of six hundred and eleven seafarers were stranded inside the Persian Gulf, unable to exit through Hormuz.²⁶ India's response combined three moves that together constitute what may be called the escort model.

First, it surged naval assets. Over half a dozen warships, including logistics-support vessels, were deployed to the Gulf of Oman and northern Arabian Sea, deliberately stationed east of the strait and expressly kept out of the waterway itself, in keeping with a non-escalatory posture that protected Indian shipping without inserting Indian warships into a contested Iranian-controlled channel.²⁷ The first escorted transits followed within days: on 14 March Indian warships met the LPG carriers Shivalik and Nanda Devi in the Gulf of Oman after they had cleared the strait, carrying some 92,700 tonnes of cargo between them, with the crude tanker Jag Laadki escorted out shortly afterwards; open-source tracking placed at least three Indian Navy vessels in the Gulf of Oman that day, and footage from the Shivalik showed a Project 15-class destroyer and an MH-60R helicopter in company.²⁸ The deployment was matched by inter-ministerial coordination on shore, run jointly across the Ministries of External Affairs, Defence, Ports, Shipping and Waterways through the Directorate General of Shipping, and Petroleum and Natural Gas, together with Indian missions in the region.²⁹

Second, India converted its diplomatic capital in Tehran into a physical passage. High-level diplomatic engagement applied alongside the naval deployment secured transit for Indian-flagged vessels through a region in which shipping from other nations faced severe restrictions. The External Affairs Minister was careful, however, to disclaim any blanket arrangement, describing each ship movement as an individual case, a characterisation that anticipates

the fragility examined in Section V.³⁰ Tehran subsequently confirmed that ships of a small group of nations, India among them, would be permitted to transit, a diplomatic outcome that no amount of naval force could have compelled and that the relationship investment of prior decades made possible.³¹

Third, and most significantly for the doctrinal argument of this paper, the effort was formalised under a dedicated operation. Urja Suraksha, literally meaning energy protection, placed the Navy on high-alert deployment in the Gulf of Oman and the northern Arabian Sea specifically to secure Indian commercial shipping transiting the vicinity of the Strait of Hormuz. Unlike the general patrol posture of Sankalp, it was built around close-protection escort of designated energy cargo's, a requirement driven by conditions inside the strait: by 20 March, the Islamic Revolutionary Guard Corps had established a designated safe corridor close to the Iranian coastline and warned against any deviation from it, and the waters remained hazardous with unrecorded mines and episodic firing on shipping.³² Indian officials coordinated with regional authorities to move Indian ships through that corridor, and the operation was conducted with deliberate minimal publicity, consistent with the non-escalatory posture. Its results were incremental rather than dramatic, and the mechanics of a single passage are instructive. The LPG carrier Pine Gas, held nearly three weeks after loading at Ruwais, was guided through the strait by the Indian Navy and then escorted for close to twenty hours from the Gulf of Oman into the Arabian Sea; her crew paid no transit fee and was not boarded at any point.³³

- **The Energy- Management Complement**

The naval instrument was fused with an energy-management response that gave the escorts strategic meaning. The Ministry of Petroleum and Natural Gas established round-the-clock monitoring of stocks and availability; refiners diversified aggressively, with the Prime Minister telling Parliament that India now imported energy from forty-one countries against twenty-seven previously,³⁴ drawing more heavily on West African, American and Russian crude to reduce Gulf-transit dependence; and the government confirmed on 26 March that crude supplies for a sixty-day horizon had been contractually tied up.³⁵ India also temporarily rerouted roughly seventy per cent of crude imports

away from Hormuz, up from fifty-five per cent, in part by absorbing Russian barrels under limited United States waivers.³⁶ The result was that the feared domestic fuel emergency did not materialise on the scale anticipated, an outcome attributable less to physical stockpiles than to the combination of naval escort, diplomatic passage and procurement agility.

Read together, these moves amount to more than crisis management. They constitute a repeatable operational template in which naval escort capability, diplomatic access and energy-procurement flexibility are exercised as a single instrument. This is the maritime expression of India's wider maritime vision, articulated first as SAGAR (Security and Growth for All in the Region) in 2015 and expanded in 2025 into MAHASAGAR (Mutual and Holistic Advancement for Security and Growth Across Regions), under which India casts itself as a net security provider and increasingly a preferred security partner in the Indian Ocean Region.³⁷ The Hormuz crisis is the first occasion on which that self-description was validated under fire, in the very waters where India's energy lifeline is most exposed.

From Closure to Contested Passage: The Crisis After April

An assessment written in April would have closed here, with the escort model vindicated. The subsequent course of the crisis does not overturn that judgement, but it substantially complicates it, and any brief submitted in mid-2026 must engage the harder second phase.

A two-week truce agreed on 8 April brought partial relief. The strait became only partially operational: Tehran indicated that vessels might transit, but that passage must be coordinated with Iranian forces, effectively preserving Iranian control over shipping movements, while more than eight hundred vessels remained backed up inside the Gulf and insurers continued to reassess risk premiums. The same truce surfaced the crisis's most consequential innovation, an Iranian proposal to levy a transit charge reported at around two million dollars per vessel, to be shared with Oman, which shipping associations immediately characterised as a departure from established maritime norms.³⁸ Operation Epic Fury was declared concluded in early May, and the

United States mounted its own short-lived escort operation in the strait at the beginning of that month.

The legal character of what Iran had done deserves emphasis because it bears directly on how India should position itself. As the National Maritime Foundation's analysis of the crisis establishes, Iran never imposed a blockade in the legal sense: no formal declaration was issued, and none of the procedural steps required for a lawful blockade were taken,³⁹ whether under customary law or as restated in the San Remo Manual on International Law Applicable to Armed Conflicts at Sea. Nor could Iran lawfully have closed the waterway. The Strait of Hormuz is a strait used for international navigation within the meaning of the 1982 United Nations Convention on the Law of the Sea, and Articles 38 and 44 preserve the right of transit passage through such straits, which the coastal State may not impede.⁴⁰ What Iran achieved was therefore not a legal closure but what the same analysis terms an actuarial one: a level of risk sufficient to price commercial traffic out of the strait, without any of the formal steps that would have exposed the measure to legal challenge. The distinction matters for India because it locates the correct response. An actuarial blockade is defeated not by legal protest but by reducing the risk premium, which is precisely what naval escort, route guidance and hydrographic support do.

A United States-Iran memorandum signed on 17 June lifted the competing blockades, and the strait reopened, with commercial traffic resuming shortly afterwards.⁴¹ Reopening, however, proved neither complete nor stable. Iran maintained that it would charge not tolls but fees for coordinating safe transit, a distinction it grounded in the strait's passage through territorial rather than international waters, and one that the United States and the Gulf Cooperation Council rejected as functionally equivalent to a toll and incompatible with freedom of navigation.⁴² India's own position had been stated earlier and more directly: in early May, New Delhi informed Tehran that Indian vessels required no special permission or protection fees and would move under the guidance of the Indian Navy.⁴³ Traffic nonetheless recovered to only a fraction of pre-war levels, floating mines kept threat assessments elevated, and by mid-July, the arrangement was visibly fraying, with attacks on commercial shipping resuming and the Observer Research Foundation observing that the Hormuz settlement was coming apart over a chokepoint on which India depends but which it does not control.⁴⁴

Three implications follow for this paper's argument, and they matter more than the narrative detail. First, the operational demand on the Indian Navy has not ended; it has become open-ended, shifting from a surge to a sustained commitment of the kind that tests hull availability, crew rotation and logistics rather than resolve.

Second, the threat has changed character. A blanket closure is a political act to be answered diplomatically; mined water, selective strikes on merchant shipping and route-conditional passage constitute an operational problem requiring mine countermeasures, persistent maritime domain awareness and de-confliction arrangements.

Third, and most consequentially, an Iran that monetises transit rather than denying it converts India's friendly-nation status from a diplomatic dividend into a commercial relationship subject to renegotiation. Concessional treatment that must be re-earned is a thinner asset than passage granted once, and India's refusal to pay protection fees, while legally well founded, transfers the burden of guaranteeing passage back onto the Navy. The escort model was designed for a closed strait; the strait India now faces is neither closed nor free, and that is the harder case.

Critical Assessment: The Fragilities of the Escort Model

Although the escort model was successful, it is not perfect, and the analytical record demands that its shortcomings be expressed as clearly as its achievements. Its durability is conditioned by three structural flaws, and the following recommendations are only understandable in opposition to them.

- **The Residual Hormuz Dependence**

Diversification of suppliers is not the same as diversification of routes. India now buys crude from some forty countries, and official commentary holds that around seventy per cent of imports were rerouted away from the Gulf during the crisis; yet a large share of that oil still reaches India through the same narrow channel, because sourcing and shipping geography are distinct.⁴⁵ The most recent public estimates place roughly forty per cent of India's crude flows as Hormuz-linked, equivalent to some 2.5 to 2.7 million barrels a day.⁴⁶ The escort model can move Indian ships through the strait when Tehran permits; it cannot conjure an alternative to the strait itself. India's energy resilience,

therefore, remains, in the last analysis, contingent on Iranian permission and on the strait's physical navigability, a dependence that the United Kingdom's parliamentary research service records may not fully ease until 2027, even after a settlement.⁴⁷

- **The Thinness of Strategic Reserves**

India's strategic petroleum reserve remains far below the ninety-day benchmark the International Energy Agency applies to its members, an obligation India does not formally bear as a non-member, but whose logic its exposure vindicates. The headline figures in circulation differ sharply, and the reason is instructive. Dedicated strategic storage under Phase I amounts to 5.33 million tonnes, equivalent to roughly nine and a half days of national consumption, held in unlined rock caverns at Visakhapatnam, Mangaluru and Padur; the rolling inventories of the public-sector oil marketing companies add a further sixty-four and a half days, giving an integrated cushion of about seventy-four days.⁴⁸ External assessments that place India's cover at a week are measuring the dedicated reserve; those that place it near eight weeks are measuring the integrated total. The distinction matters because the two are not equivalent in a crisis: commercial inventories are working stock distributed across refineries and the distribution chain, not a sovereign reserve available for release on decision. Phase II, now reportedly fast-tracked, would raise standalone strategic cover to only about twenty-two days.⁴⁹ On any of these measures, the crisis was navigated because acute disruption was cushioned by diplomatic passage and procurement agility rather than by stored volume. A closure in which India was not on the friendly-nation list would have tested the reserve to a point that the escort model alone could not have relieved. Naval escort is a solution to the transit problem, not to the storage problem; the two are complements, and the second remains underdeveloped.

- **The Codification Gap in SLOC Security**

This paper's earlier draft argument, that India lacks any codified framework for sea-lane protection, requires qualification. The unclassified Indian Maritime Security Strategy of 2015, *Ensuring Secure Seas*, expressly identifies SLOC

protection among the Navy's operational functions and was itself compiled with inputs from the Indian Army, the Indian Air Force, Headquarters Integrated Defence Staff and the Indian Coast Guard, a genuinely joint document.⁵⁰ The strategy also formalised the net security provider concept that the Hormuz deployment operationalised.⁵¹ The standing up of Operation Urja Suraksha as a named, purpose-built energy-SLOC mission is likewise a step toward institutionalisation rather than away from it.

The gap is therefore narrower and more specific than a blanket claim of doctrinal absence, and stating it precisely makes it more actionable. Indian Maritime Security Strategy-2015 establishes SLOC protection as a strategic function; what remains unwritten is the executive framework beneath it. There is no published statement of activation triggers, pre-designated force packages, sustainment norms for distant-station escort operations, or command and coordination relationships across the Navy, Headquarters Integrated Defence Staff, the Ministry of External Affairs and the energy ministries for a chokepoint contingency far from Indian shores. Sankalp and Urja Suraksha have been executed with distinction, but they rest on operational practice and inter-ministerial coordination convened crisis by crisis rather than on a standing framework. The gap mirrors the one identified in the preceding chapter in the economic domain: an architecture that works in practice but is under-institutionalised on paper, and therefore more dependent on the disposition of the current leadership than is structurally desirable. A capability exercised brilliantly but codified nowhere is harder for partners to rely upon and harder for the state itself to sustain across changes of personnel and government.⁵²

- **The Corridor Question**

Finally, the crisis sharpened rather than resolved the strategic case for reducing chokepoint exposure by structural means. The India-Middle East-Europe Economic Corridor was conceived precisely as an overland-and-maritime alternative that would lessen dependence on single chokepoints; the closure of Hormuz is the most vivid argument yet advanced for it. Yet the same war that strengthened the corridor's rationale also suspended its progress, with Gulf port infrastructure directly targeted. The Israeli-Saudi normalisation on which its

northern leg depends has meanwhile receded further, with implementation still lacking firm funding commitments or construction timelines as of mid-2026.⁵³ The escort model, in other words, is a necessary answer to a vulnerability whose structural remedy remains years away. This is not a criticism of the model but a specification of its place: it secures the lifeline as it exists, while the work of building alternatives proceeds on a slower clock.

Recommendations

The following recommendations are directed at the strategic and naval-policy community. They are sequenced from highest-leverage to most diffuse.

- Codify the escort model as a standing SLOC-protection framework beneath IMSS-2015. The single highest-leverage step is to convert the hard-won practice of Sankalp and Urja Suraksha into a published executive framework specifying activation triggers, pre-designated force packages, sustainment and rotation norms for distant-station operations, and clear command relationships across the Navy, Headquarters Integrated Defence Staff, the Ministry of Defence, the Ministry of External Affairs and the energy ministries. Codification would reduce the model's dependence on crisis-time improvisation and make India's security-provider role legible to partners in advance of the next crisis.
- Close the storage gap and settle the metric. Naval escort addresses transit; it cannot substitute for strategic depth. Expanding the strategic petroleum reserve toward a meaningfully longer coverage horizon and accelerating the commercial and underground storage programme would give the escort model the time buffer it presently lacks. Equally important, and considerably cheaper, is publishing a single authoritative definition of India's emergency cover so that planning is not conducted against three competing figures.
- Invest in mine countermeasures and persistent maritime domain awareness for the second phase. The threat since April is not closure but mined water, selective strikes on merchant shipping and route-conditional passage. Mine countermeasure capacity, unmanned surface and underwater systems for route survey, and persistent surveillance are the capabilities this phase demands, and they are procurement decisions with long lead times that should be taken now.

- Deepen de-confliction arrangements with Gulf and Iranian naval authorities. The escorts succeeded partly because India could position forces without colliding with the parties to the conflict. Institutionalising information-sharing and communication channels, building on existing navy-to-navy ties and the Information Fusion Centre, Indian Ocean Region, would shorten the warning-to-response cycle and reduce the risk of miscalculation in a crowded, contested waterway.
- Treat friendly-nation status as a diplomatic asset to be maintained, and prepare for its monetisation. India's placement on Iran's passage list was the dividend of decades of relationship investment, including Chabahar. With Iran now proposing transit charges with differentiated treatment for friendly states, that status is shifting from a concession to a commercial arrangement. Sustaining the balance that produced it should be understood as an energy-security measure in its own right, and India should have a settled position on the legality and acceptability of transit charges before it is asked to pay them.
- Advance structural alternatives on the slower clock they require, and build the analytical base. The deepening of Indian ports such as Mundra, the expansion of LNG-import terminals and incremental progress on corridor connectivity retain intrinsic value irrespective of the northern leg and should be pursued now. In parallel, dedicated research tracks and sponsored chairs on sea-lane security and West Asian maritime affairs would supply the cadre, fluent in naval operations, Gulf politics and energy economics alike, on which a sustained security-provider posture depends.

Conclusion

India entered the 2026 war on Iran with a doctrine of de-hyphenation that had never been tested by open regional war and an energy lifeline that ran through a strait a hostile power could close. It emerged with both propositions bruised but intact, and the reason they survived is the argument of this paper. The diplomatic balancing that kept India in a working relationship with Israel, Iran and the Arab Gulf simultaneously was not an act of rhetorical agility alone; it was underwritten by the material capacity to escort Indian shipping past the region's decisive chokepoint and to keep the fuel

flowing home. Balancing as posture would have collapsed under the weight of a closed strait; balancing as capacity did not.

Read alongside the maritime theory that gives it weight, India's conduct is a demonstration of the Mahanian proposition this study has made its own: that sea power rests, in the end, on the industrial and technological base that builds and sustains the fleet. The destroyers, frigates and support vessels that held station east of Hormuz were the material expression of the Atmanirbhar Guardrail at sea, self-reliant capability converted into diplomatic freedom of action. The fragilities are real. The residual dependence on the strait, the thinness of the reserve and the codification gap beneath Indian Maritime Security Strategy (IMSS)-2015 each specify a load-bearing condition rather than a fatal flaw, and each marks work still to be done. The crisis, moreover, has not ended; it has changed shape, and the contested, priced and mined strait of mid-2026 is a harder problem than the closed strait of March.

But the direction of travel is unmistakable. In the Israel-Palestine-Iran triad, India was neither a bystander nor a supplicant. It was a maritime power securing its own lifeline and, in doing so, quietly establishing itself as a security provider in the waters on which its future depends. The chapters that follow carry this argument outward, from the defence of India's sea lines to the wider architecture of resilience and reassurance through which India proposes to remain indispensable to a fragmented region.

Declaration

I declare that this manuscript is being submitted exclusively to CENJOWS for publication consideration, is original, and has not been published or submitted elsewhere. I further certify that it contains no classified, restricted, or sensitive information and is based entirely on open-source material suitable for publication in the public domain.

ENDNOTES

- ¹ P. R. Kumaraswamy, *India's Israel Policy* (Columbia University Press, 2010), JSTOR, <https://doi.org/https://doi.org/10.7312/kuma15204>.
- ² Nicolas Blarel, *The Evolution of India's Israel Policy: Continuity, Change, and Compromise since 1922* (Oxford University Press, 2014), <https://doi.org/https://doi.org/10.1093/acprof:oso/9780199450626.001.0001>.
- ³ Ministry of External Affairs, 'Prime Minister's Address to the Knesset', 25 February 2026, https://www.mea.gov.in/Speeches-Statements?dtl/40821/Prime_Ministers_Address_to_the_Knesset_February_25_2026.
- ⁴ DD News, 'Prime Minister Modi Addresses Joint Press Statement in Israel, Announces Elevation to Special Strategic Partnership', 26 February 2026, <https://ddnews.gov.in/en/prime-minister-modi-addresses-joint-press-statement-in-israel-announces-elevation-to-special-strategic-partnership/>.
- ⁵ Anum Khan, *The Real Cost of Maritime Conflict in the Strait of Hormuz: Implications for India's Security of Energy*, 28 March 2026, <https://maritimeindia.org/the-real-cost-of-maritime-conflict-in-the-strait-of-hormuz-implications-for-indias-security-of-energy/>.
- ⁶ Jackie Northam et al., 'Iran's Ayatollah Ali Khamenei Is Killed in Israeli Strike, Ending 36-Year Iron Rule', Middle East Conflict, *NPR*, 1 March 2026, <https://www.npr.org/2026/02/28/1123499337/iran-israel-ayatollah-ali-khamenei-killed>.
- ⁷ IEA, 'Strait of Hormuz - About', February 2026, <https://www.iea.org/about/oil-security-and-emergency-response/strait-of-hormuz>.
- ⁸ Paul Stahle, 'India's Energy Security at a Crossroads: The Hormuz Crisis and an Opportunity for US-India Cooperation', *Atlantic Council*, 5 June 2026, <https://www.atlanticcouncil.org/blogs/energysource/indias-energy-security-at-a-crossroads-the-hormuz-crisis-and-an-opportunity-for-us-india-cooperation/>.
- ⁹ Vrinda Sahai, *India's Oil Security Strategy: Structural Vulnerabilities and Strategic Choices*, 14 April 2026, <https://carnegieendowment.org/india/research/2026/04/indias-oil-security-strategy-structural-vulnerabilities-and-strategic-choices>.
- ¹⁰ Akashvani News, 'Lok Sabha: EAM S. Jaishankar Urges Dialogue and Diplomacy to De-Escalate West Asia Tensions', News on Air, 3 September 2026, <https://newsonair.gov.in/lok-sabha-eam-s-jaishankar-urges-dialogue-and-diplomacy-to-de-escalate-west-asia-tensions/>.
- ¹¹ Debduitta Chakraborty, 'India Calls for Diplomatic Solution amid West Asia War Flare-Up', The Print, 6 August 2026, <https://theprint.in/diplomacy/india-calls-for-immediate-de-escalation-diplomatic-solution-amid-west-asia-war-flare-up/2954157/>.
- ¹² C. R. Mohan, *Modi's World: Expanding India's Sphere of Influence* (HarperCollins India, 2015), <https://books.google.co.in/books?id=oRXmCQAAQBAJ>.
- ¹³ Ian Hall, *Modi and the Reinvention of Indian Foreign Policy*, 1st edn (Bristol University Press, 2019), JSTOR, <https://doi.org/10.2307/j.ctvpwhf20>.
- ¹⁴ Ratnajyoti Dutta and Sambit Mohanty, 'India Says It Is Diversifying Oil Sources to Bolster Energy Security', S&P Global Energy, 16 February 2026, <https://www.spglobal.com/energy/en/news-research/latest-news/crude-oil/021626-india-says-it-is-diversifying-oil-sources-to-bolster-energy-security>.
- ¹⁵ R. Shamashastry, *Kautilya's Arthashastra* (n.d.), https://ia801503.us.archive.org/26/items/kautilyas-arthashastra/Kautilya%27s%20Arthashastra_R%20Shamasastri.pdf.
- ¹⁶ Khan, *The Real Cost of Maritime Conflict in the Strait of Hormuz: Implications for India's Security of Energy*.
- ¹⁷ Sahai, *India's Oil Security Strategy*.
- ¹⁸ Alfred Thayer Mahan, *The Influence of Sea Power Upon History, 1660-1783* (1890), <https://www.gutenberg.org/ebooks/13529>.
- ¹⁹ Geoffrey Till, *Seapower: A Guide for the Twenty-First Century*, 4th edn (London: Routledge, 2018), <https://doi.org/10.4324/9781315621210>.
- ²⁰ Mahan, *The Influence of Sea Power Upon History, 1660-1783*.

-
- ²¹ Julian Stafford Corbett, *Some Principles of Maritime Strategy* (2005), <https://www.gutenberg.org/ebooks/15076>.
- ²² Ken Booth, *Navies and Foreign Policy (Routledge Revivals)* (London: Routledge, 2014), <https://doi.org/10.4324/9781315769646>.
- ²³ PIB Delhi, 'Op SANKALP : 3RD YEAR OF INDIAN NAVY'S MARITIME SECURITY OPERATIONS', 19 June 2022, <https://www.pib.gov.in/Pressreleaseshare.aspx?PRID=1835382®=3&lang=2>.
- ²⁴ Deccan Herald, 'Operation Sankalp: Sixteen Indian-Flagged Vessels Provided Safe Passage Everyday', Deccan Herald, 14 July 2021, <https://www.deccanherald.com/india/operation-sankalp-sixteen-indian-flagged-vessels-provided-safe-passage-everyday-1008499.html>.
- ²⁵ PIB Delhi, 'INDIAN NAVY'S ONGOING MARITIME SECURITY OPERATIONS ("OP SANKALP") 14 DEC 23 TO 23 MAR 24', 23 March 2024, <https://www.pib.gov.in/www.pib.gov.in/Pressreleaseshare.aspx?PRID=2016201>.
- ²⁶ Sudhi Ranjan Sen, 'India Sending Warships to Gulf of Oman, Arabian Sea to Escort Fuel Tankers amid West Asia War', *ThePrint*, 19 March 2026, <https://theprint.in/india/india-sending-warships-to-gulf-of-oman-arabian-sea-to-escort-fuel-tankers-amid-west-asia-war/2883651/>.
- ²⁷ Sudhi Ranjan Sen, 'India Deploys Warships Near Gulf of Oman to Escort Fuel Tankers', Bloomberg, 18 March 2026, <https://www.bloomberg.com/news/articles/2026-03-18/india-sends-warships-near-gulf-of-oman-to-escort-its-fuel-ships>.
- ²⁸ Adithya Krishna Menon, 'Indian Warships Escort Indian LPG Tankers in Gulf of Oman', *Naval News*, 15 March 2026, <https://www.navalnews.com/naval-news/2026/03/indian-warships-escort-indian-lpg-tankers-in-gulf-of-oman/>.
- ²⁹ Anil Bhat, *India Asserts Its Maritime Power to Ensure Energy Shipping*, 16 May 2026, <https://dailypioneer.com/news/india-asserts-its-maritime-power-to-ensure-energy-shipping>.
- ³⁰ Anjana Pasricha, 'Two India Carriers Secure Safe Passage through Strait of Hormuz', *Defense News*, 16 March 2026, <https://www.defensenews.com/global/asia-pacific/2026/03/16/two-india-carriers-secure-safe-passage-through-strait-of-hormuz/>.
- ³¹ Sahai, *India's Oil Security Strategy*.
- ³² Bhat, *USIran Tensions 2026*.
- ³³ Saurabh Sharma, 'How an Indian LPG Tanker Escaped Hormuz via an Unusual Route', Reuters, accessed 20 July 2026, <https://www.reuters.com/world/asia-pacific/how-an-indian-lpg-tanker-escaped-hormuz-via-an-unusual-route-2026-03-31/>.
- ³⁴ Akashvani News, 'Lok Sabha: EAM S. Jaishankar Urges Dialogue and Diplomacy to De-Escalate West Asia Tensions'.
- ³⁵ Dutta and Mohanty, 'India Says It Is Diversifying Oil Sources to Bolster Energy Security'.
- ³⁶ News on Air, 'India Secures 70% of Crude Oil Imports Outside Strait of Hormuz: Petroleum Ministry', Akashvani News, 3 November 2026, <https://newsonair.gov.in/india-secures-70-of-crude-oil-imports-outside-strait-of-hormuz-petroleum-ministry/>.
- ³⁷ Suchitra Durai, 'India's Maritime Vision: From SAGAR to Indo-Pacific to MAHASAGAR', Embassy of India, Dili, Timor Leste, 13 August 2025, <https://www.indembassydili.gov.in/section/articles-commissioned-by-xpd-division/india-s-maritime-vision-from-sagar-to-indo-pacific-to-mahasagar-by-amb-suchitra-durai/>.
- ³⁸ Akashvani News, 'Ceasefire Brings Temporary Relief in Gulf, Strait of Hormuz Partially Operational', News on Air, 4 August 2026, <https://newsonair.gov.in/ceasefire-brings-temporary-relief-in-gulf-strait-of-hormuz-partially-operational/>.
- ³⁹ Konstantinos Deligiannis-Virvos, 'The Closure of the Strait of Hormuz by Iran: Considerations over the Law of the Sea and Law of Naval Warfare', *Opinio Juris*, 5 June 2026, <https://opiniojuris.org/2026/05/06/the-closure-of-the-strait-of-hormuz-by-iran-considerations-over-the-law-of-the-sea-and-law-of-naval-warfare/>.
- ⁴⁰ International Humanitarian Law, 'IHL Treaties - San Remo Manual on Armed Conflicts at Sea, 1994', accessed 20 July 2026, <https://ihl-databases.icrc.org/en/ihl-treaties/san-remo-manual-1994>.

-
- ⁴¹ Yashraj Sharma, 'Strait of Hormuz Reopens: But Can Ships' Safety Be Assured?', ALJAZEERA, 17 June 2026, <https://www.aljazeera.com/features/2026/6/17/strait-of-hormuz-reopens-how-will-safe-passage-for-ships-be-ensured>.
- ⁴² *United Nations Convention on the Law of the Sea* (1982), https://www.un.org/depts/los/convention_agreements/texts/unclos/unclos_e.pdf.
- ⁴³ Bhat, *USIran Tensions* 2026.
- ⁴⁴ Manoj Joshi, 'From Hormuz to Malacca: Rethinking India's Maritime Strategy', Observer Researcher Foundation, 14 July 2026, <https://www.orfonline.org/expert-speak/from-hormuz-to-malacca-rethinking-india-s-maritime-strategy>.
- ⁴⁵ Amitendu Palit, *India's Energy Security Challenge: Diversifying Crude Oil Imports*, 19 January 2026, <https://www.isas.nus.edu.sg/wp-content/uploads/2026/01/ISAS-Brief-1331.pdf>.
- ⁴⁶ Sahai, *India's Oil Security Strategy*.
- ⁴⁷ Patrick Butchard and Philip Loft, *Israel/US-Iran Conflict 2026: Reopening the Strait of Hormuz* (House of Commons Library, 2026), <https://commonslibrary.parliament.uk/research-briefings/cbp-10636/>.
- ⁴⁸ Sambit Mohanty, 'India Weighs Alternate Crudes, Refining Costs, Economic Fallout as Iran Conflict Drags On', S&P Global, accessed 20 July 2026, <https://www.spglobal.com/energy/en/news-research/latest-news/crude-oil/030526-india-weighs-alternate-crudes-refining-costs-economic-fallout-as-iran-conflict-drags-on>.
- ⁴⁹ Sanjay Kamra, 'From Vulnerability to Resilience: Redefining India's National Maritime Energy Security Doctrine', Articles and Commentaries, *India Foundation*, 29 June 2026, <https://indiafoundation.in/articles-and-commentaries/from-vulnerability-to-resilience-redefining-indias-national-maritime-energy-security-doctrine/>.
- ⁵⁰ Directorate of Strategy, Concepts and Transformation, Integrated Headquarters, Ministry of Defence (Navy), 'Ensuring Secure Seas: Indian Maritime Security Strategy by Ministry of Defence (Navy), 2015', October 2015, <https://icsf.net/resources/ensuring-secure-seas-indian-maritime-security-strategy-by-ministry-of-defence-navy-2015/>.
- ⁵¹ Capt Gurpreet S. Khurana, "NET SECURITY PROVIDER" DEFINED: AN ANALYSIS OF INDIA'S NEW MARITIME STRATEGY-2015', *National Maritime Foundation*, 23 November 2015, <https://maritimeindia.org/net-security-provider-defined-an-analysis-of-indias-new-maritime-strategy-2015/>.
- ⁵² Kamra, 'From Vulnerability to Resilience'.
- ⁵³ Samriddhi Vij, *The Paradox of Resilience: IMEC and the Iran Conflict*, ORF Special Report no. 310 (2026), <https://orfme.org/expert-speak/the-paradox-of-resilience-imec-and-the-iran-conflict/>.