

# Russia's War in Ukraine: India's Balancing Act

New Delhi's refusal to condemn Russia's war in Ukraine complicates its foreign policy maneuvering. How India positions itself in an increasingly polarized competition for global dominance will become more important. It will continue to leverage conflicting partnerships to secure its own rise.

By Boas Lieberherr

India has become the US' counterweight of choice against China and an indispensable partner in European Indo-Pacific strategies. Against the backdrop of an increasingly assertive and ambitious China, India's relations with the West have witnessed a remarkable strategic convergence over the last decade. In Europe and the US, this has led to the misperception that India is now aligned with the West. However, India has so far abstained on all UN votes condemning Russia's aggression in Ukraine and has not joined the multilateral sanctions regime against Moscow. This has raised questions about its reliability as a strategic partner for the West.

India's refusal to join international condemnations of Russia does not appear to be to its detriment. Since the start of the Russian invasion, India has been courted by the US, China, Russia, and Europe to influence its position. This reflects India's growing strategic importance at a time when economic, political, and military weight is shifting further toward Asia. India could assume the role of a global swing state that might determine the balance of power. For the US, New Delhi's support would give it an edge in its competition with China.

India shifts allegiance depending on issues. It is pursuing a vision of a multipolar world rather than following the US' lead. Its foreign policy of "strategic autonomy", as de-



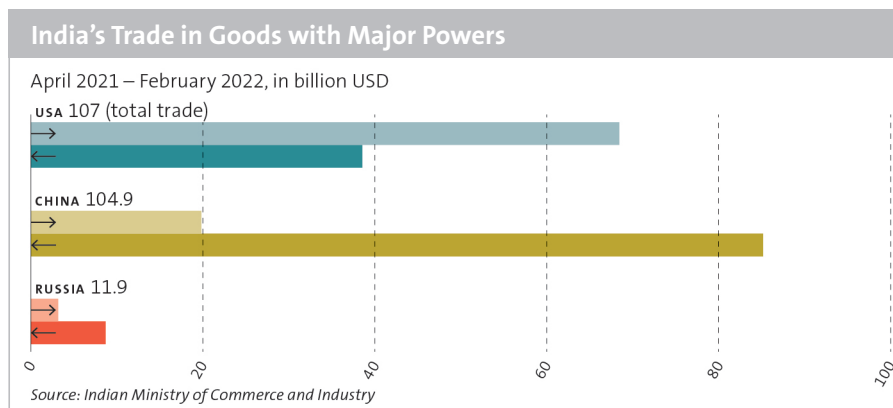
Russia's President Vladimir Putin attends a meeting with India's Prime Minister Narendra Modi in New Delhi on 6 December 2021. *Mikhail Klimentyev / Kremlin via Reuters*

finied by New Delhi, is based on cultivating relationships with relevant actors beyond geopolitical polarization. However, Russia's invasion of Ukraine forces India to perform a balancing act between its long-standing strategic partner Russia and the increasingly important relationship it cultivates with the US. From India's perspective, antagonizing Moscow is not an option as this might drive Russia closer into China's ambit. An isolated and weakened Russia

complicates India's strategic environment. New Delhi therefore hopes that the war will end as soon as possible. Until then, it will likely continue to follow a middle path to minimize its strategic losses.

## India-Russia Relations

India's foreign policy mantra of "non-alignment" and its long-standing relationship with Moscow offer an explanation for its current stance over Russia's war in Ukraine.



Following a century of colonial occupation, India did not want to risk its hard-won independence by moving into the ambit of the US or the Soviet Union. Hence, India became a forerunner of the Non-Aligned Movement during the Cold War. This was coupled with a deep suspicion of US power, which was reinforced by Pakistan's emergence as a pivotal US ally. However, India's non-alignment policy evolved over time and was agile in practice. On the eve of the Indo-Pakistani war in 1971, India and the Soviet Union signed the Treaty of Peace, Friendship and Cooperation as Pakistan grew closer to the US and China. India and the Soviet Union established strong strategic, economic, and military ties.

The dissolution of the Soviet Union in 1991 and the transformation of the global order forced India to make drastic policy changes. Subsequently, India began to liberalize its economy. The 2006 US-India Civil Nuclear Agreement also paved the way for closer bilateral ties with Washington. However, Russia remained an important partner. In 2009, for instance, the two countries, together with China and Brazil, formed the BRIC, a political counterweight to the G7. The former Indian Foreign Secretary Vijay Gokhale stated in 2019 that "India has moved on from its non-aligned past. India is today an aligned state – but based on issues." For New Delhi, strategic autonomy is a means to navigate a multipolar world, where power is more evenly distributed. Such an environment is also hospitable for India to pursue its own rise.

In recent years, Russia's importance in India's set of interest-based relations has diminished. The cornerstone of the bilateral relationship remains defense cooperation. About 70 per cent of India's current mili-

tary inventory is of Russian or Soviet origin. In contrast to Western partners, Moscow co-develops and co-produces high-leverage strategic technologies with India such as the BrahMos supersonic cruise missile. Russian weapons are also relatively cheap compared to the West. However, in the last two decades, India has managed to significantly reduce its dependence on Russian arms imports. In terms of trade relations, Moscow ranks 24th with a trade volume of 11.9 billion USD, far below its trade with the US and China (see graph). Strategic perspectives are also partially drifting apart. Russia is, for instance, critical of India's role in the US Indo-Pacific strategy. Nevertheless, bilateral relations have survived ups and downs in the past. Russia-India ties have proved to be reasonably stable perhaps precisely because they are relatively independent of their respective relations with third parties.

### The War's Impacts

Russia's aggression in Ukraine complicates India's management of its complex set of foreign relations to balance its main strategic challenge, China. Yet, for New Delhi, the immediate ramifications of the war in Ukraine are less far-reaching than for Europe. Since independence, India's immediate strategic environment has been unstable; a trend that has become even more pronounced in recent years. Bilateral relations with China have soured. New Delhi competes with Beijing on several fronts, including on influence in neighboring Nepal, Bangladesh, and Sri Lanka. Pakistan – China's "all-weather friend" – remains a hostile nuclear power on India's western front. Instability in Afghanistan and Myanmar further aggravates the security situation in South Asia.

In India, Russia's invasion of Ukraine has economic, political, and security consequences. India's economy has been faltering even before the COVID-19 pandemic began. According to a recent survey, many Indian security experts see the issue of a slowing economy as India's primary strategic challenge. To underpin its quest for global leadership, India needs solid and sustainable economic growth. Increasing commodity and energy prices, caused by the war, will weigh on India's growth, inflation, and the current account deficit. India's GDP forecast for this year has already been downgraded by 0.8 percentage points to 8.2 per cent. Higher oil prices are particularly serious because India imports 85 per cent of the oil it consumes. However, India tries to partially mitigate this effect through discounted oil imports from Russia. India is benefiting from an oversupply of Russian oil as international sanctions have prompted many oil importers to shun trade with

### For New Delhi, strategic autonomy is a means to navigate a multipolar world.

Moscow, driving Russian crude prices to record lows. While Russia accounted for only two percent of India's oil imports last year, that share is likely to rise significantly this year.

On a political level, India currently walks a tightrope between its long-standing strategic partnership with Russia and its ever-closer relationship with the US and the Quad – an informal security cooperation format consisting of the US, Australia, India, and Japan. India has abstained on several UN votes condemning Russia's aggression on Ukraine. This has been met with widespread public criticism in the West. India's stance on Ukraine, however, is more nuanced. New Delhi stated its displeasure with the war in explanations of UN votes, reaffirming the respect for territorial integrity and sovereignty and unequivocally condemning the killings in Bucha. In private, India is likely to have expressed its dissatisfaction with the war. Even though Western governments would prefer India to adopt a more outspoken position, senior government officials of the US, the EU, Germany, and Japan, among others, have made public statements expressing understanding for India's "distinct" relationship with Russia. However, the potential limits of cooperation with India may have become more apparent to the US and Europe in the context of its muted criticism of Russia.

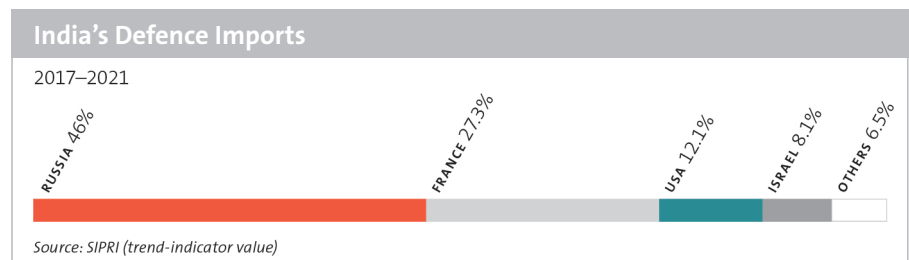
As far as India's security is concerned, its heavy dependence on Russian weapons has become a liability. Currently, India finds itself in a border standoff with China that led to the deployment of large amounts of troops and heavy weapons along the border in the Himalayas. Its defense inventory is also in dire need of modernization. Given domestic demand, sanctions, banking restrictions, and a ban on semi-conductors, it is unclear whether Moscow will be able to supply defense platforms, spare parts, and maintenance on which the Indian Armed Forces depend for their continued operational readiness and modernization. Moreover, Ukraine might also be unable to supply critical components for Indian weapon systems, e.g. gas turbine engines for Russian-built frigates, given the destruction of Ukrainian defense factories and the focus on its own defense needs. Kyiv may also deny exports to India because of its positioning *vis-à-vis* Russia.

### Difficult Choices

Russia's aggression against Ukraine presents India with difficult strategic choices. India's worst-case scenario would be an unchecked Russia-China axis, where Beijing might be able to influence Russia's future cooperation with India. Against the backdrop of the ongoing border standoff between India and China, this scenario could prove particularly challenging for New

## By not antagonizing Russia, New Delhi is trying to prevent further strategic convergence between Russia, China, and Pakistan.

Delhi. Closer Russia-Pakistan ties would further complicate India's strategic environment. Then-Prime Minister Imran Khan visited Moscow on the day the Russian invasion of Ukraine began. Even though the "no limits" partnership between Russia and China will be limited by several factors, New Delhi seems to believe that not antagonizing Russia is the best strategy to prevent further strategic convergence between Russia, China, and Pakistan. It is, however, unclear whether India's position of omitting public criticism *vis-à-vis* Russia will prove successful in thwarting such a scenario. India's calculus is probably that, given India's importance in Western Indo-Pacific strategies, the US and Europe may be more lenient toward India than Russia would be if India adopted an openly critical posture of Moscow. Nevertheless, there is a



trade-off between India's reluctance to criticize Russia publicly and closer cooperation with the West. This trade-off is likely to become more complicated as the war drags on and war crimes, death, and destruction continue to mount.

India's ambition to rise to great power status is best achieved in a multipolar world, where no country or group of countries can maintain a grip on the core institutions of international cooperation. India believes it can then leverage respective partnerships and secure its rise. However, Russia's ability to play a meaningful role in such a multipolar environment is likely to be severely diminished in the future. India's bet that Russia will survive the current situation in a reasonably good shape may explain why New Delhi has not openly criticized Moscow yet. For India, the challenge is how to hedge in the case of dwindling Russian power and influence. New Delhi is likely to invest more in new poles and old partnerships. In early May, Indian Prime Minister Narendra Modi traveled to Europe and met with the heads of state of Germany and France, among others. The Indian Foreign Minister Subrahmanyam Jaishankar has repeatedly pointed out that relations with Europe are "underperforming". India will work to strengthen its relations with both the EU and individual member countries.

The war in Ukraine has highlighted the constraints and risks resulting from India's heavy reliance on foreign arms. This dependence is due to India's underdeveloped defense industry. India is the world's largest defense importer. This severely limits both India's aspiration to become a great power and its strategic autonomy. The Indian government's long-term goal in defense matters is more self-reliance, and the war will add further incentives for indigenization. However, the adopted steps have shown only limited success so far. Foreign suppli-

ers will continue to be of great importance to India. For instance, even if India could procure comparable weapon systems from the West, it is unlikely to abandon its defense links with Russia. Moscow will remain a desirable source of cheap and adequate weapon systems without major end-user constraints. At the same time, India will seek to exploit the current environment to further diversify its defense inventory on terms favorable to New Delhi. Defense partnerships with the US, France, and Israel, among others, are likely to be expanded. However, a larger dependence on Western platforms is unlikely to lead to greater strategic convergence on worldviews between India, the US, and Europe.

### The Indo-Pacific's Future

Simply put, the "Indo-Pacific" is a geopolitical construct that aims to contain China. In this framework, India has a key role to play. US President Joe Biden's recently published Indo-Pacific strategy recognizes India as a "leader in South Asia and the Indian Ocean, a driving force of the Quad, and an engine for regional growth and development." If India were to rethink its partnerships with the US and Europe, the Indo-Pacific would lose steam. The Indo-Pacific framework depends on the participation of India, the strategically most important country in the Indian Ocean region. At the same time, India is the Quad's weakest link and China is well aware of that. A rapprochement between Beijing and New Delhi still remains a possibility. Since the war began, senior government officials from around the world – including Russia, China, the US, the EU, the UK, Germany, and Japan – have traveled to New Delhi to understand and influence its position, recognizing India's geostrategic importance. India could increasingly assume the role of a global swing power, which is likely to increase its bargaining power.

New Delhi will continue to try to manage its foreign relations as independently as possible from geopolitical polarization. In

this regard, the US, the Quad, and Europe form only one side of India's efforts to work toward great power status and to balance a rising China. Russia represents another strand of effort. New Delhi will have to weigh how far it can go in its relations with Russia without incurring significant costs

## The future of the “Indo-Pacific” will depend on whether cooperation can be advanced beyond alignment on China.

in its cooperation with Western partners. Leveraging different relationships and exploiting rivalries carries a number of risks and may have adverse effects. For example, if India were to significantly increase its oil imports from Russia, this could trigger the imposition of secondary sanctions by the US or affect Washington's willingness to grant a waiver for India's import of the Russian S-400 air defense missile systems to avoid sanctions under the Countering America's Adversaries Through Sanctions Act. Because it is keeping other doors open, India will likely have to forgo some of the benefits that would accrue from aligning closer with the US and Europe, such as defense cooperation in high-leverage technologies.

The West will remain pivotal to India's efforts to address its main strategic challenge, China, its weak defense industry, and looming economic problems. Although India does not seek an alliance with the US, nor does it want the US to be its only major partner, it will continue to seek closer cooperation with Washington. A discussion in India's lower house on Ukraine has illustrated a recognition that India's policy has structurally shifted toward closer ties with the West. For a country that for decades saw itself as non-aligned, this is a noteworthy development. The future of the “Indo-Pacific” will depend on whether cooperation can be advanced beyond alignment on China. India's close cooperation with the US, the Quad, and Europe, which has continued in the context of major differences over the Russian invasion, shows that these relations have matured.

### Compromises and Opportunities

So far, India's foreign policy of strategic autonomy seems to have worked relatively well. Because of greater global integration, the strategic appeal of non-alignment, or rather multi-alignment, might be even stronger than during the Cold War. In fact, a large number of states outside Europe and North America have refrained from joining

multilateral sanctions against Russia. For India, maneuvering amid conflicting partnerships and issues is a challenge and involves compromises. Because the West sees India as a counterweight to China, New Delhi has so far managed to weather the turmoil of Russia's war. In the context of significant power shifts, India's positioning with respect to various issues could become increasingly important. However, as the world's largest arms importer, India has not yet found a solution to one of its biggest challenges: a weak national defense industry and correspondingly heavy dependence on foreign suppliers. This will limit its strategic leeway in the future.

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