



Delhi Policy Group

Advancing India's Rise as a Leading Power



POLICY BRIEF

India-Russia Relations: The Geostrategic Perspective

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Indian Prime Minister Narendra Modi in a bilateral meeting with the President of Russia, Vladimir Putin, in Moscow, Russia, on July 9, 2024. (Source: [President of Russia/Official Website](#))

Indian Prime Minister Narendra Modi in a private meeting with the President of Russia, Vladimir Putin, in Moscow, Russia, on July 8, 2024. (Source: [President of Russia/Official Website](#))

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India-Russia Relations: The Geostrategic Perspective

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I. Introduction

Prime Minister Narendra Modi's visit to Russia on July 8-9, the first bilateral visit of his third term in office, has drawn unfavourable comments in the West, from its timing just prior to the NATO Summit to its symbolism amidst a raging conflict in Ukraine. These have been strongly refuted by India, citing its strategic independence and freedom of choice, as well as the longstanding and mutually beneficial ties between India and Russia.

This raises the question of PM Modi's political and strategic intent in deviating from his past practice of making his first visit to a neighbouring country, while also underlining the importance attached by India to its partnership with Russia.

The answer lies largely in the prevailing global geopolitical balance, and the forces that are shaping it. With the rise of an assertive China and the deepening strategic overstretch of the United States (US), the world order is moving towards a highly contested, multi-domain bipolarity. The US and China are locked in a security, political, economic and technological contest, in which the US is attempting to preserve its unipolar dominance by rallying allies and partners, leveraging its control over multilateral financial institutions, and resorting to unilateral economic sanctions and other coercive instruments. China, on the other hand, is pushing the security envelope in the Indo-Pacific through military and grey zone assertions, and is leveraging its vast manufacturing, trade and technological capabilities to outpace the US and its European allies to create its own set of global dependencies and dominance in Asia.

Another central issue is the West's fixation with preventing a Russian military victory in Ukraine at any cost by imposing unacceptable military, economic and geopolitical costs on Moscow. This is propelling an ever closer China-Russia strategic nexus, as China has become Russia's main political, security, technology and trading partner. China's support has buttressed Russian resilience in countering the West. The downside, however, is that this is also increasing Russia's dependence on China.

These developments have serious ramifications for India.

The India-Russia strategic equation is shaped by both bilateral relations and the dynamics of geopolitical trends.

Even as India is incrementally drawing closer to the West and shedding its critical dependencies on weapons and strategic systems from Russia, the reality is that there is a legacy dependency of close to 40%, mostly in major weapon systems, which is not easy to shed without impacting defence capability. Furthermore, given the disruptions caused by the Ukraine war in global energy and food supply chains, obtaining discounted crude supplies and essential spare parts for Indian defence systems is a necessity. India cannot overlook the fact that as the border standoff with China enters its fifth year, Russia has maintained its defence supply commitments, despite some delays. The upshot is that Russian energy supplies have helped India maintain its post-Covid growth trajectory, while its defence posture has not been adversely impacted. This bilateral perspective simply cannot be overlooked.

The geopolitical imperative of India-Russia relations needs to be seen from a India-Russia-US-China quadrilateral perspective. Here, it is important to highlight that India is a close strategic partner of both the US and Russia, while Russia is a partner of China and India. Given the fact that India-China relations appear likely to remain strained, at a minimum in the medium term, a close strategic partnership with both the US and Russia is central to balancing Chinese assertions. Can India and the US, or India and Russia, balance China? Conversely, can the US on its own balance both China and Russia? An obvious answer to these equations is that the partnership of both the US and Russia with India provides each of them the leverage to constrain and balance China.

A major conclusion that can be drawn from the above is that while Russian and Indian security dynamics are being driven by opposing camps (the West and China respectively), the India-Russia partnership remains strong, critical and important in managing emerging geopolitical trends. Based on the foregoing, this brief will examine the following elements:

- India-Russia relations within the changing global order.
- Imperatives of the India-US-Russia triangle, and its strategic implications for the balance of power in the Indo-Pacific.
- China-Russia relations, including whether India's bilateral relations with Russia can be a hedge against Chinese expansionism/assertions.
- Conclusions, with implications for India and the global strategic balance.

II. India-Russia Bilateral Partnership

The historical relationship between India and Russia has suffered from rising geopolitical tensions, with the two nations being pulled in opposite directions. While India's relations with the US have progressed, Russia has pursued closer ties with China and rapprochement with Pakistan. After the hiatus caused by the COVID-19 pandemic, India and Russia resumed their annual leaders' level bilateral summit in December 2021. This was followed by the "no-limits

friendship” established by the China-Russia joint statement of February 4, 2022, and Russia’s invasion of Ukraine on February 24, 2022.

From the invasion of Ukraine till PM Modi’s visit to Moscow in July 2024, the two leaders had only held one meeting on the sidelines of the Shanghai Cooperation Organization (SCO) summit in Samarkand in September 2022¹. The subsequent annual leaders-level meetings in 2022 and 2023 were cancelled due to “scheduling issues”². The main diplomatic engagement at the leadership level was through telephone conversations, making up for eight out of nine interactions from February 2022 to March 2024³. The recent summit of the leaders in July 2024 appears to have been motivated by a need to address issues in bilateral relations which have been exacerbated by the war in Ukraine, as much as by the geopolitical factors outlined above.

Following the Ukraine conflict, Russia has emerged as an important trading partner of India. Bilateral trade between India and Russia has far surpassed the goal of reaching \$30 billion by 2025, touching nearly \$50 billion in FY 2022-23⁴. India’s oil imports from Russia account for 79% of this total trade⁵. However, the imbalance in trade is significant, as India’s exports to Russia were only \$3 billion in FY 2022-23. Indian companies like Tata Steel and Infosys joined the mass exodus of international companies leaving Russia in 2022⁶. The companies that have continued to trade with Russia have encountered problems in making payments, as efforts to de-dollarize bilateral trade have led to the use of the Russian rouble and have later switched to the Indian rupee. In addition, Indian companies run the risk of violating US export control regimes, like the CAATSA (Countering America’s Adversaries Through Sanctions Act) legislation of 2017 and facing secondary sanctions.

The outcomes of the Modi-Putin summit highlighted in their joint statement are aimed at rectifying some of these imbalances. The two leaders announced

¹ Haidar, Suhasini. 2022. “Samarkand SCO Summit | PM Modi Tells Vladimir Putin ‘Now Is Not an Era of War.’” *The Hindu*. September 17, 2022.

<https://www.thehindu.com/news/national/pm-modi-holds-talks-with-russian-president-vladimir-putin-on-sidelines-of-samarkand-sco-summit/article65899314.ece>.

² Yesli Seli, and Yesli Seli. 2023. “India-Russia Leadership Summit Likely to Resume in 2024, Says Jaishankar.” *The New Indian Express*. December 27, 2023.

<https://www.newindianexpress.com/nation/2023/Dec/27/india-russia-leadership-summit-likely-to-resume-in-2024-says-jaishankar-2645465.html>.

³ “India-Russia Relations in Troubled Times: Steady but Stagnating.” n.d. IFRI - Institut Français Des Relations Internationales. <https://www.ifri.org/en/publications/notes-de-lifri/asie-visions/india-russia-relations-troubled-times-steady-stagnating>.

⁴ “Embassy of India, Moscow (Russia).” n.d. <https://indianembassy-moscow.gov.in/bilateral-relations-india-russia.php>.

⁵ Sharma, Sukalp. 2024. “Sanctions Notwithstanding, India’s Russian Oil Imports Surge as Moscow Pushes More Oil Overseas.” *The Indian Express*, May 3, 2024. <https://indianexpress.com/article/business/sanctions-notwithstanding-indias-russian-oil-imports-surge-as-moscow-pushes-more-oil-overseas-9304385/>.

⁶ Madhok, Diksha. 2022. “Some Big Indian Businesses Are Joining the Exodus From Russia.” *CNN*. April 22, 2022. <https://edition.cnn.com/2022/04/21/business/india-tata-steel-infosys-stops-russia-business-hnk-intl/index.html>.

an intention to increase bilateral trade to \$100 billion by 2030⁷. The joint statement also talks about the need to eliminate tariff and non-tariff barriers to trade, promote a bilateral settlement system using national currencies, and increase Indian exports to Russia through “strengthening industrial cooperation, forging new technological and investment partnerships, especially in advanced high-technology areas and finding new avenues and forms of cooperation”. A bilateral free-trade agreement in services and investments is also being explored, in addition to the recently commenced negotiations for a Free Trade Agreement on goods between India and the Eurasian Economic Union.

India-Russia defence cooperation remains a critical component of bilateral relations. Owing to the Ukraine war, India’s own Aatmnirbhar programme, and the diversification of defence supplies from the US, France and Israel, India’s share of Russia’s defence exports has steadily declined from 76% between 2009-13 to 36% in 2019–23, according to the SIPRI arms transfer database⁸. Wide-ranging Western sanctions have impacted Russia’s military-industrial complex, denying it access to cutting-edge technological systems, and redirecting production to meet internal demands as opposed to catering to export markets. This has resulted in delays in the supply of advanced Talwar-Class Stealth Frigates⁹ and S-400 Triumf air defence system¹⁰ units. One Indian company has been subjected to sanctions imposed by the European Union (EU) for supplying equipment, particularly electronics and microchips, to Russia¹¹ and one sanctioned by Japan¹². Despite this downtrend, the reality is that India remains dependent on Moscow for spare parts, ammunition and important legacy systems.

The joint statement highlights an attempt by the two countries to reorient and secure their defence partnership, with a focus on joint research, co-development and joint production of advanced defence technology and systems in line with India’s ‘Make in India’ programme. It also aims to

⁷ “Joint Statement Following the 22nd India-Russia Annual Summit.” n.d. Ministry of External Affairs, Government of India. <https://www.mea.gov.in/bilateral-documents.htm?dtl/37940/Joint+Statement+following+the+22nd+IndiaRussia+Annual+Summit>.

⁸ “Trends in International Arms Transfers, 2023.” 2024. SIPRI. March 11, 2024. <https://www.sipri.org/publications/2024/sipri-fact-sheets/trends-international-arms-transfers-2023>.

⁹ DW Bureau, and DW Bureau. 2023. “Russia Delays Advanced Talwar-Class Stealth Frigates’ Delivery yet Again.” Defence Watch. August 16, 2023. <https://www.defencenews.com/news/latest-defence-news/russia-delays-advanced-talwar-class-stealth-frigates-delivery-yet-again>.

¹⁰ Reuters, and Reuters. 2023. “IAF Cuts Procurement Budget on Russia Defence Supply Delays.” Deccan Herald. March 24, 2023. <https://www.deccanherald.com/india/iaf-cuts-procurement-budget-on-russia-defence-supply-delays-1203078.html>.

¹¹ “EU Agrees First Sanctions on Chinese and Indian Companies for Russia War Links.” n.d. Financial Times. <https://www.ft.com/content/7ef97342-48fa-4969-b3ee-bc7419b69e65>.

¹² Balasubramanyam, Dipanjan Roy Chaudhury and K R. 2024. “Japan Sanctions Bengaluru Tech Company Over Russian War ‘support.’” The Economic Times, June 24, 2024. <https://economictimes.indiatimes.com/news/defence/japan-sanctions-bengaluru-tech-co-over-russian-war-support/articleshow/111212456.cms?from=mdr>.

encourage joint manufacturing of spare parts, components, aggregates and other products for the maintenance of Russian-origin arms and defence equipment in India. The joint ventures to facilitate the transfer of technology are intended not only to meet India's requirements, but also subsequent export to "mutually friendly third countries"¹³. The reality of the above discourse is that despite the reduction in defence trade, Russia remains a reliable partner and important hedge against the ongoing backdrop of shifting co-production and co-development to Western suppliers, largely the US and France.

III. Geopolitical Dynamics Impacting India-Russia Relations

(i). The India-US-Russia Triad

As already highlighted, the Indian Prime Minister's visit to Moscow generated a considerable amount of concern within the US establishment, with barely concealed anger and an undertone of threats against a strategic partner with whom the US supposedly shares "the most important bilateral relationship". The less than popular US envoy to New Delhi added his own caveat, warning that India should not take the relationship for granted, clearly underscoring limits and even asserting that strategic autonomy is an overstated concept. In his view, nations cannot exercise strategic autonomy in times of conflict, implying that if push comes to shove, India will have to choose sides. This is not the language of diplomacy that inspires trust, and goes against the grain of US pronouncements that it is not asking nations in the Indo-Pacific to take sides in the US-China competition. Not surprisingly, statements by the US envoy and other senior US officials have drawn measured admonishment from the Indian side.

Thus, it is clear that the American - and the West's - insecurity over India-Russian relations is driven largely by a deepening animosity and antagonism towards Russia, and a self-centred perception of European security architecture. This tendency may well be exacerbated as the Western allies face setbacks on the battlefields of Ukraine. The fact that India's engagement with the West remains structurally secure, commercially beneficial, and is underpinned by a broader convergence of security interests, is either overlooked or under-appreciated.

The West essentially wants to restrict India's foreign policy choices and throw New Delhi's time-tested partnership with Moscow into the cauldron of its all-consuming confrontation against Vladimir Putin¹⁴.

¹³ "Joint Statement Following the 22nd India-Russia Annual Summit." n.d. Ministry of External Affairs, Government of India. <https://www.mea.gov.in/bilateral-documents.htm?dtl/37940/Joint+Statement+following+the+22nd+IndiaRussia+Annual+Summit>.

¹⁴ independent.co.uk/news/world/europe/vladimir-putin-ap-russia-narendra-modi-ukraine-b2575871.html

India's defence and energy needs in a highly disturbed geopolitical environment, created by the Ukraine and Gaza conflicts and a continuing border confrontation with China, are hardly appreciated. The reality is that in the prevailing circumstances, India *cannot afford to alienate Moscow*, nor can it base its Russia policy on Western insecurities.

Another factor is a fundamental misunderstanding of the Russia-China-India dynamics. If America aims to weaken the Russia-China axis, then it is important to encourage New Delhi to keep the channels of communication with Russia open and positive¹⁵. Some important aspects of note in this regard are:

- a. Both India and the US have a shared interest in preventing the China-Russia partnership from developing into a strong countervailing alliance. This requires a review of the US sanction/confrontation strategy by providing options to Russia to wean it away from China. One obvious option is putting an end to the brutal and senseless conflict in Ukraine through a cease-fire and resorting to a negotiated solution. India, with its close relations with Russia and growing ties with the West, can play an important role, along with others, to foster dialogue.
- b. Forsaking Russia will practically force Moscow to draw closer to Beijing, despite their power asymmetry. In addition, this will imply a China-Russia domination over Eurasia, along with their strong convergence in the maritime domain of the Indo-Pacific as also in the Persian Gulf, extending in the future across the Middle East. The US needs to consider a broader perspective based on realpolitik, rather than continue to be driven by an all-consuming historical animosity with Russia.
- c. Another factor that the West must come to terms with is whether Russia is a European power or a Eurasian outlier. If it is the former, then sooner rather than later it will have to be accommodated in European security architecture. Failing to do so will lead to a perpetual and debilitating hostility, which at least Europe can ill afford.
- d. Finally, and importantly, the West is getting increasingly alienated from the Global South, providing an opportunity to the China-Russian combine to leverage the potential of BRICS, SCO and the emerging China-Russia-Iran-North Korea axis, to shape an alternative global order that diminishes the West's power and influence.

(ii). The Russia-China-India Equation

The China-Russia-India equation is a complex triangular relationship, where harbouring relations with one threatens to disrupt partnership between the others. PM Modi's visit to Moscow came a week after the Shanghai Cooperation

¹⁵ <https://www.firstpost.com/opinion/modi-putin-summit-america-must-understand-that-it-cannot-make-india-abandon-russia-13792841.html>

Organisation (SCO) Summit in Kazakhstan, where India was represented by External Affairs Minister Dr. S Jaishankar, drawing criticism from China which highlighted waning Indian interest in the organisation. It was even suggested that SCO decisions should not be made by consensus, but through a majority vote. The absence of Prime Minister Modi from the SCO leaders' meeting, which was attended by Chinese President Xi Jinping, and remarks of Chinese officials, further underscored the freeze in India-China bilateral relations. At the same summit, President Putin referred to his country's relations with China as the "best in history."

A prolonged security and economic disruption in Europe - the Russia-Ukraine war - furthers China's strategic interests. The war keeps the US and the West preoccupied with Europe, leaving their capacities diminished and focus divided away from China. In addition, the war drains Russia's resources, resulting in the shrinking of Moscow's influence both in Eurasia and Eastern Europe, and allowing China the opportunity to create a larger footprint in Central Asia. Russian oil exports also assist China in meeting its energy requirements at discounted pricing. A partnership with Russia helps China, in the absence of a network of powerful allies, pose a stronger challenge against the US and the West.

The recent reinvigoration in the partnership between China and Russia is driven by their perception of a common challenge being mounted against them by the West. Economic, defence and technological cooperation with China has helped Russia circumvent Western sanctions. While China has not supplied lethal weapons to Russia since 2022, it is said to have exported more than \$300m¹⁶ worth of dual-use drone and rocket technology, satellite imagery, and machine tools needed for Russia's continued defence production¹⁷. Trade between the two countries has reached a record \$240 bn in 2023, more than 64% higher than 2021¹⁸. Russia is China's top crude oil supplier, exporting some 107 million tonnes in 2023, a 24% increase from 2022. In turn, Moscow has absorbed Chinese exports of electric vehicles (\$23 bn in 2023), even as the US has imposed a 100% tariff on electric cars from China¹⁹.

The dissonance in China-Russia relations over India is evident. While China boycotted the G20 Tourism Summit hosted by India in Kashmir, Russia

¹⁶ "Behind the Scenes: China's Increasing Role in Russia's Defense Industry." n.d. Carnegie Russia Eurasia Center. <https://carnegieendowment.org/russia-eurasia/politika/2024/05/behind-the-scenes-chinas-increasing-role-in-russias-defense-industry?lang=en>.

¹⁷ "New Phase in Russia's Misinformation Campaign Against U.S., Sources Say." 2024. <https://www.nbcnews.com/politics/national-security/china-helping-russia-momentum-ukraine-war-top-us-spy-rcna150437>.

¹⁸ Yi, By Kelly Ng & MA. 2024. "How Is China Supporting Russia After It Was Sanctioned for Ukraine War?" May 17, 2024. <https://www.bbc.com/news/60571253>.

¹⁹ Sherman, By Natalie. 2024. "Biden Hits Chinese Electric Cars and Solar Cells With Higher Tariffs." May 15, 2024. <https://www.bbc.com/news/business-69004520>.

attended the meeting with high-profile representation. Moscow continues to invite India into its Far East and Arctic zone, as reflected by the recent signing of a programme of India-Russia cooperation in trade, economic and investment spheres in the Russian Far East for the period 2024-2029²⁰. Defence cooperation with China has also not prevented Russia from pursuing close defence relations with India. Russia has agreed to begin production of armour-piercing rounds for Russian-made battle tanks in India,²¹ and will deliver the last two squadrons of S-400 air defence missile systems to India by the third quarter of 2026²². In the area of connectivity, the two countries have recently agreed to establish the Chennai-Vladivostok maritime corridor, a sea link connecting ports on the east coast of India to ports in the far-east region of Russia.

Despite these positive factors, the emerging Russia-China axis is a critical foreign policy challenge for India. A strengthening defence partnership between Russia and China can impact India's access to advanced technologies or alter the balance of military support. China's large market for energy exports from Russia has the potential to drive up the costs of oil. This will be disadvantageous for India in meeting its energy security requirement, which is currently being met at discounted prices.

A weakened Russia, over-dependent on China, is not in India's interest. It raises New Delhi's concerns about the increased influence of China in the region, and its ability to dictate Russia's foreign policy choices. India provides Russia a vital hedge against over-dependence on China. By inviting New Delhi to play a more proactive role in Eurasia, Moscow ensures that China's expanding footprint in the region is countered by other major powers like India. It also helps Russia to both ensure and diversify its energy and defence markets in Asia.

China has responded strongly to the continued defence relations between India and Russia. Against the interests of China, Moscow has enabled and facilitated the development of India's defence industry. However, Beijing recognises that an attempt at isolating New Delhi's access to the defence market in Russia will push the country further into the ambit of the West. Closer defence cooperation between India and the US/West, as opposed to with

²⁰ "Joint Statement Following the 22nd India-Russia Annual Summit." n.d. Ministry of External Affairs, Government of India. <https://www.mea.gov.in/bilateral-documents.htm?dtl/37940/Joint+Statement+following+the+22nd+IndiaRussia+Annual+Summit>.

²¹ Reuters. 2024. "Russian Armour-piercing Tank Rounds to Be Made in India, Rostec Says." Reuters, July 4, 2024. <https://www.reuters.com/business/aerospace-defense/russian-armour-piercing-tank-rounds-be-made-india-rostec-says-2024-07-04/>.

²² Business Today Desk. 2024. "Russia to Deliver Remaining 2 S-400 Air Defence Missiles to India by Q3 of 2026: Sources." Business Today, March 21, 2024. <https://www.businesstoday.in/india/story/russia-to-deliver-remaining-2-s-400-air-defence-missiles-to-india-by-q3-of-2026-sources-422331-2024-03-21>.

Russia, is even more damaging for China's national interest. Meanwhile, India's relations with Russia continue to be a friction point and limiting factor in its relations with the US.

IV. Conclusions

The fundamental reality that the West needs to understand is that given Eurasian and Indo-Pacific related priorities, India cannot forsake its strategic interests for the sake of the West's unmitigated antipathy towards Russia. Equally, in the emerging US-China dominated bipolar global order, Russia is a balancing power, even as it may look to be increasingly aligned with China.

This is even more so considering that while China is castigated as a silent enabler in terms of material and political support to Russia's war efforts, the US and Europe remain open to constructive engagement with China across the political and economic spectrum.

In stark contrast, the NATO alliance has little concern for China's continued belligerence on India's borders, even as the US and its allies expect Indian support for any Taiwan-centric contingency in East Asia. The question that arises is that if the West can act in its own interest to shape ties with China, why does it expect considerations to be any different for India's engagement with Russia?

As Russia becomes more confident in managing its conflict with Ukraine, despite massive military aid from the NATO countries and the West's economic assistance to Kyiv, it is also attempting to carve out its own strategic space by forging partnerships with North Korea and Vietnam, which lie in China's strategic periphery. Similarly, Russian moves in Iran and Syria, and warnings over the expanding conflict in Gaza, are noteworthy.

Russia's initiatives in North Korea are disconcerting for China. A more ambitious North Korea, with an upgraded nuclear arsenal and delivery capability, can create tensions with South Korea, leading to military escalation. Trouble in its backyard could draw China into a crisis which it will be loath to join. There are also concerns that should former President Trump return to power, North Korea may seek a separate deal with the US, much to China's chagrin.²³

Russia's role is also significant in shaping the narrative of the Global South and leveraging an expanded BRICS. It is in this space that China is attempting to lead the discourse by using its security and economic initiatives. A Europe enmeshed in Ukraine, and a US building alliances and partnerships in East Asia

²³ asia.nikkei.com/Spotlight/Comment/Is-the-China-Russia-friendship-facade-set-to-crumble

and the Western Pacific, cannot also be credible factors in the Global South, thus forcing India to seek broader power equations in which Russia will always be an critical partner. This is of utmost importance as Chinese analysts have already started to claim that an expanded BRICS, along with the SCO, are part of a China-dominated space which must be leveraged to serve Chinese interests.

An interesting facet of these increasingly complex equations is that to counter NATO expansionism, Russia is encouraging the revival of the Russia-India-China dialogue. This is being seen as an attempt to provide India with an alternative to greater alignment with the West, while simultaneously highlighting to China the futility of an extended confrontation with India.

The above analysis highlights that the US attempt to define the India-Russia partnership as one where New Delhi is beholden to Russia is misplaced and misperceived. India too holds some vital cards and its relations with Russia can be leveraged to provide a modicum of balance against intensifying Russia-China relations. It is more important than ever for the West to look beyond self-serving narratives and grasp this reality.



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