

COUNTERING RHETORIC WITH REALISM VIA THE GLOBAL SOUTH PIVOT: EVALUATING INDIA'S STRATEGIC FORESIGHT AMID FRACTURED WESTERN POWER DYNAMICS DURING THE HORMUZ CRISIS

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ABSTRACT

The 2026 Strait of Hormuz crisis has reinforced the geopolitical significance of maritime chokepoints in shaping economic security, regional stability, and strategic decision-making. As one of the world's most critical energy corridors, the Strait remains crucial to India's energy imports and trade flows. This paper examines the cascading implications of the crisis on India's national security framework, underscoring vulnerabilities in energy dependence, industrial supply chains, fertilizer imports, and food security. It argues that the crisis extends beyond a regional conflict and represents a structural challenge within an increasingly fragmented global order.

The study further explores how contradictions within Western strategic responses and vulnerabilities among Gulf Cooperation Council (GCC) states have deepened instability and left import-dependent economies such as India exposed to collateral consequences. With this context, this paper evaluates India's strategic foresight through its evolving doctrine of strategic autonomy, multi-vector diplomacy, and Global South engagement. It positions the crisis as a theatre for India to exercise issue-based partnerships while maintaining diplomatic flexibility across competing powers.

Drawing on realist international relations theory, the paper argues that India's Global South pivot is not merely rhetorical, but grounded in strategic pragmatism aimed at securing energy resilience, diplomatic space, and long-term influence in an emerging multipolar order. Ultimately, the Strait of Hormuz crisis reveals the growing necessity for an adaptive foreign policy framework that combines realism and strategic independence.

Keywords: Strait of Hormuz Crisis, Strategic Autonomy, Global South, Multi-Vector Foreign Policy, Energy Security, Realism, Multipolarity, India's Foreign Policy

INTRODUCTION

The Strait of Hormuz remains one of the most strategically significant maritime chokepoints in the contemporary international system, serving as the primary transit route for nearly one-fifth of global oil trade and a substantial share of liquefied natural gas exports. The Strait connects the Persian Gulf to the Gulf of Oman and the Arabian Sea. But its geopolitical significance extends beyond geography. It acts as a structural pillar of global energy security and economic stability. Historically, tensions surrounding the Strait have reflected broader contests of power, sovereignty, and regional influence.

The 2026 Strait of Hormuz crisis has once again brought this maritime corridor into focus, exposing the fragility of global supply chains and the weaponisation of strategic chokepoints in a fractured international order. What initially appears as a regional conflict carries broader implications for import-dependent economies, especially those whose industrial and agricultural systems are tied to uninterrupted energy flows. In this regard, India stands among the most vulnerable.

As the world's third-largest importer of crude oil and a major consumer of liquefied petroleum gas, India's economic growth, industrial productivity and domestic energy security remain closely tied to Gulf stability. A significant proportion of its oil, LNG, and fertilizer imports are carried through the Strait, making any such disruption a direct national security concern. However, the crisis also presents an opportunity to evaluate India's broader foreign policy transformation. Over the last two decades, India has initiated a shift from traditional non-alignment toward a more pragmatic framework of strategic autonomy and multi-vector diplomacy. This transition reflects acknowledgement of an emerging multipolar world, where rigid alliances often constrain rather than strengthen national interests. Simultaneously, India's growing leadership within the Global South has enabled it to expand issue-based partnerships based on economic resilience, diplomatic flexibility, and institutional reform.

This paper examines the Strait of Hormuz crisis as both a structural challenge and a strategic test for India. It evaluates the cascading economic consequences of disruption, the geopolitical contradictions among Western and the Gulf and the broader implications for India's national security conundrum. More importantly, it argues that India's response reflects a deeper strategic foresight grounded in realism, where the Global South pivot serves as a practical instrument of resilience and influence in a transforming world order.

CASCADING IMPACT OF STRAIT OF HORMUZ CRISIS ON INDIAN ECONOMY

The Strait of Hormuz holds a vital position in India's national security & economic framework, playing an indispensable role in energy imports and trade with the Gulf. The Strait is among the world's most strategic maritime chokepoints, its disruption historically holding massive implications for global trade & stability. Similarly, as an outcome of the 2026 Strait of Hormuz crisis, India has become increasingly vulnerable, with its exposed dependencies in energy attainment, logistics as well as industry supply chains.

India entered this crisis more exposed than any other major economy (3). As the third largest importer of crude oil globally, its energy procurement remains heavily dependent on imports. A significant portion of this Crude oil alongside Liquefied Natural Gas (LNG) transit through

the Strait of Hormuz (3). India's buffer capacity remains thin as compared to other advanced economies with alternate sourcing channels. This makes this crisis a direct national security concern for the country.

A prolonged disruption of the Strait would hold severe implications on the Indian economy. Within the energy sector, the reduced maritime distance has led to an increase in crude oil prices, a prolonged disturbance of this magnitude would lead to a surge in oil and LNG prices, increasing India's cost of import, resulting in a potential trade deficit (5). Increased oil prices would put pressure on the economy, affecting transportation, electricity generation, and industrial activity and production. The International Monetary Fund (IMF) has projected that even a short-term conflict in the region can reduce the global GDP growth in 2026 from 3.4% to 3.1%, whilst also being an inflationary peril (5). In India, energy plays a central role in growth, especially for the industrial sector, thus this could cause significant destabilisation.

Beyond energy distribution, the Strait of Hormuz crisis has demonstrated how interference of such chokepoints is a risk for the global logistical system (2). Military deployment, shift in shipping schedules and increased maritime premiums are some examples of the same in the Asian logistics climate that includes India (2). Ship operators are now facing greater pressure, with an increase in insurance premiums, war-risk surcharges and having to re-route traffic across other trade corridors (5). This has also hindered other trade routes, delaying exchange across Asia-Europe and other trans-pacific lanes (2).

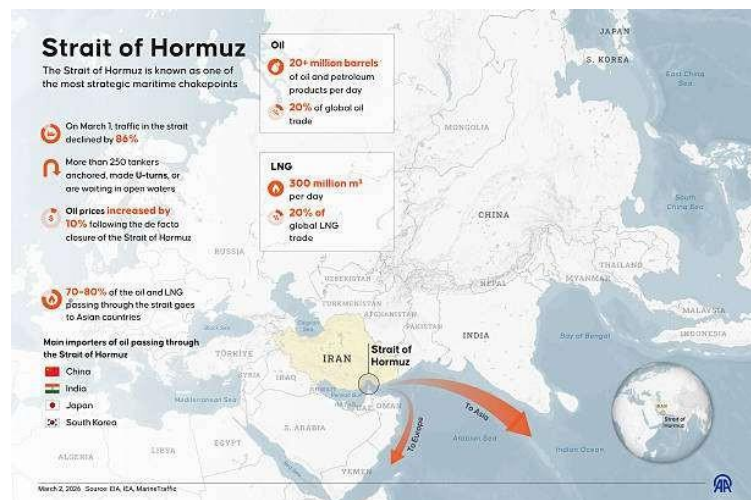


Figure 1: Impact of Strait of Hormuz on Global Business

As for the industrial sector, India's manufacturing base is heavily dependent on the import of raw materials and energy-intensive production, which is resulting in an increase in operational costs. Fertilizer supply-chains are growing particularly vulnerable (5). To estimate the dependence of the Fertilizer supply-chains on the Strait, India, in 2024, imported about 9.8 million metric tonnes (MMT) of fertilizer through the Strait (8). This accounts for nearly 54% of its fertilizer imports. This dependence is a resultant of the Gulf's dominance in global fertilizer exports, contributing 43% of global urea exports, 44% of sulfur exports, 27% of ammonia exports, and 16% of phosphate exports (8). Any prolonged disturbances can therefore directly impact agricultural productivity, rural inflation and food security.

But perhaps the most alarming resultant of the 2026 crisis can be the near-collapse of shipments through the Strait. Shipping through the Strait has collapsed by over 95% falling

from 103 vessels in the last week of February 2026 to single digits (8). Such a drastic fall goes to show the fragility of the supply chains. Buffer stocks- be it in fertilizers, energy or industrial inputs-would deplete rapidly, halting production within a short period of time. (2). This would create a multiplier effect wherein disruption in one trade corridor will alter broader economic stagnation.

As an outcome, India has recognized that the Strait of Hormuz goes beyond a trade route, but is actually a core element of its security ecosystem. Strategic responses are therefore crucial across operational pillars. First, rote and infrastructural development and diversification. So, expanding energy partnerships beyond the gulf, investing in alternate trade corridors and strengthening connectivity with the rest of the world.

Precautionary action too has now become indispensable. Building early warning systems, alternative infrastructure (i.e. trade routes) and deeper cooperation with the remainder of the world is a necessity that would prevent India from similar vulnerabilities in the future (2). This crisis has highlighted a broader geopolitical lesson; in an era with fragmented global politics and weaponizing global chokepoints, economic and national security are becoming increasingly indispensable.

COLLATERAL DAMAGE IN INDIA: ROOT CAUSE IN CONTRADICTIONARY WESTERN & VULNERABLE GCC COUNTRIES

The Strait of Hormuz crisis not only reflects regional instability, but also contradictions within the western strategic response and structural vulnerabilities of the Gulf Cooperation Council (GCC) states.

The strategic divide between the US and Europe plays a critical role in the cause of this instability. While the US has opted for a violent approach toward Iran with military operations, sanctions, etc, Europe generally prefers to follow a more diplomatic and de-escalation-based approach. The combined US-Israeli strikes against Iran marked military escalation, with regime change as a key objective (5). The latter left very little room for diplomatic exchange. This in turn has fractured the collective western crisis management ecosystem.

The alternatives of diplomacy present to be problematic by nature, but at the same time avoid danger posed by economic, nuclear humanitarian disasters that could result in war (5).

The Gulf remains militarised through US deployments and military bases while also being an energy corridor. The vulnerabilities of the GCC nations are an outcome of the same. Western states remain heavily dependent on the west for security and lack strategic autonomy. This creates an unstable dependence structure which results in weakening the energy security of other countries such as India, that have now become collateral damage.

In this scenario, multinational institutions including the International Maritime Organization (IMO), G7, Indian Ocean Rim Association (IORA) play a vital role to secure energy security by coordinating maritime security and emergency responses (2).

INDIA'S NATIONAL SECURITY CONUNDRUM

The Strait of Hormuz crisis has exposed a deeper national security dilemma for India that extends into energy dependence and regional diplomacy. The Strait remains one of the world's most critical energy chokepoints, connecting the Persian Gulf to the Arabian Sea and the Gulf of Oman, making it indispensable for energy dependent economies such as India, South Korea, China & Japan (2). Any disruption in this corridor therefore acts as a direct threat to the energy security of these nations, leaving these nations at an intersection of economic vulnerability and geopolitical tension.

For India, the most pressing concern lies in energy security. Liquefied petroleum gas (LPG) has become the most acute point of vulnerability with 92% of Indian imports of LPG travelling through the Strait (3). This dependence has become more alarming looking into India's strategic storage capacity, which at a time had reduced to just 1.5 -2days (3). With over 330 million LPG-dependent households and merely around 16 million piped natural gas (PNG) connections—covering just 5% of households—the absence of a viable short-term substitute creates domestic risk (3). Thus, even a brief disruption can have immediate political and social consequences, especially on LPG dependent regions.

Although India has made progress in diversifying crude imports, expanding from 27 supplier countries in 2006–07 to nearly 40 today, this flexibility remains concentrated in oil and not in LPG (3). This leaves a critical asymmetry in India's energy security ecosystem. The strategic goal of reducing Hormuz-exposed crude imports from about 46% to 30–35% by 2030 is increasingly becoming not just an economic goal but a national security requirement (3). However, this goal requires investment in alternate supply-chains and expansion of reserves for long-term benefits.

This crisis also affects India's agriculture and food-security. While the Hormuz crisis hasn't affected grain directly, India has also observed an increase in fertilizer prices (8). This in turn will result in a requirement to change production decisions and fertilizer use patterns before the consequences become evident in spikes in food prices (8). In a country like India, where agriculture remains central to both employment and food security, such a shift in fertilizer access will result in lesser productivity, inflation in prices, and distress in rural sections of the country.

Beyond economic vulnerabilities, South Asian countries like India and Pakistan would also have to deal with a diplomatic shift in security problems (5). Pakistan's position in this conflict adds a layer to the regional equation and security stance. Pakistan has acted as a mediator between Iran and the US (5), which can directly alter the US response to the region.

Similar to India, China too is heavily dependent on the Gulf for its energy imports. But unlike India, it has carried out sustained efforts to prioritize energy security (15). China has sought to diversify its suppliers, maximize its reserve capacity and build alternate corridors, yet it remains dependent on the global energy system based on maritime exchange, thereby still keeping it at risk in the Strait of Hormuz crisis (15). This leaves a shared pressure among these countries to secure their energy flows.

In terms of International Law, Article 38 of UNCLOS guarantees transit passage through

international straits such as Hormuz irrespective of the tension in the area (2). But in a world where military escalation overshadows legal frameworks, the implication of such laws is restricted. The implication of these rights will rely on joint international communities' determination and activism (2).

The global dynamics are further challenged because Europe and Asia, having been hit harder by energy shocks, are signalling divergence from full alignment from the US policy (13). This represents a shift in international relations, with evolving strategic interests.

India's foreign policy has evolved to reflect a similar pattern of multi-alignment and engagement with multiple blocs based on national interest, emphasizing on strategic autonomy over alignment with post-cold war blocs (7). This allows for India to maintain individual relations with the US, the Gulf and Iran. Yet the crisis presented a challenge in form of Indian national security conundrum

ACKNOWLEDGING INDIA'S STRATEGIC FORESIGHT

The Strait of Hormuz crisis has reinforced India's role as an emerging global power navigating a rapidly shifting international order. In an era marked by changing alliances, growing economic interdependence, and security instability, India's policy of strategic autonomy over rigid alliances is proving increasingly relevant. While the term 'Multi-Vector Foreign Policy' may be recent, its underlying principles trace deep historical roots (1). During the Cold War, India pursued a policy of non-alignment, seeking to preserve independence from competing power blocs (1).

This historical commitment to autonomy has evolved into a broader strategy of multi-alignment, where India engages multiple actors based on national interest rather than bloc loyalty (1). Unlike the binary structures of the Cold War, contemporary global politics demand greater flexibility, and India has adapted by expanding its diplomatic space without compromising independent decision-making.

This evolution reflects India's recognition of a changing global order increasingly defined by fragmentation, multipolarity, and shifting balances of power. In this context, strategic autonomy allows India to engage rival powers while maintaining room for manoeuvre in times of crisis. The Strait of Hormuz crisis has demonstrated the practical relevance of this approach, where India has balanced relations across competing regional and global actors without formal alignment.

Prime Minister Narendra Modi has further reinforced this outlook by placing the principle of Vasudhaiva Kutumbakam at the centre of India's foreign policy, linking India's civilizational heritage with its contemporary diplomatic role as a promoter of peace, cooperation, and shared progress (6). This has enabled India to project itself not only as a regional actor, but as a credible and pragmatic power in an increasingly unstable international system.

Ultimately, the Strait of Hormuz crisis highlights the strategic foresight embedded within

India's evolving foreign policy. As alliances weaken and multipolarity deepens, India's ability to remain pragmatic, independent, and strategically flexible continues to define its rise as an emerging global power.

THE GLOBAL SOUTH PIVOT

The twenty-first century is witnessing a profound shift in the global order, from unipolar dominance toward an increasingly multipolar system. In this transition, the Global South has emerged as a significant political, economic, and strategic entity. For India, this transformation presents an opportunity to expand its influence and redefine global governance through issue-based partnerships, economic cooperation, and a renewed commitment to South-South cooperation.

India's engagement with the Global South has evolved into a diverse and multi-pronged diplomatic strategy aimed at strengthening relations across developing regions, including Africa, Latin America, Southeast Asia, and West Asia (1). Since independence, India has positioned itself as an advocate for the concerns of the Global South, making this community a central pillar of its foreign policy (1). This reflects India's long-standing belief that the political and economic independence of developing nations is essential for creating a more equitable international order.

India's approach has shifted from symbolic solidarity to practical issue-based partnerships. Historically, South-South cooperation emphasized ideological unity against colonialism and Western dominance. However, this framework has now expanded into collaborations across trade, technology, agriculture, climate action, and food security. India's cooperation with the United Nations in strengthening South-South initiatives reflects this transition from resistance-based to development-oriented cooperation (1).

A significant aspect of this shift lies in India's role as a mediator between the developed North and the developing South (1). India occupies a unique position within the Global South, possessing growing economic and strategic influence while retaining historical legitimacy among developing nations. This enables it to navigate conflicting global interests while advocating for more inclusive governance structures.

The Voice of Global South Summit marked a significant milestone in operationalizing this vision. Initiated by India, the summit highlighted its commitment to amplifying the concerns of developing countries and integrating their priorities into the global governance framework (1). This vision was further reinforced by Narendra Modi's call for reforming institutions such as the United Nations to better represent the voice of the Global South (6). The summit emphasized that development and dignity must belong to all nations, not merely the economically dominant powers (6).

India's presidency of the G20 Summit provided another important platform to project this philosophy globally (6). Guided by the principle of Vasudhaiva Kutumbakam—the belief that the world is one family—India framed its leadership around dialogue, cooperation, and collective progress. This gave India's foreign policy a distinct ideological foundation while aligning values with strategic pragmatism.

Economic cooperation forms another pillar of India's Global South pivot. Through bilateral trade agreements with countries such as the United Arab Emirates, Singapore, and South Korea, India has strengthened economic resilience and reduced dependence on Western markets (1). Simultaneously, India's experimentation with rupee- and yuan-based payments for Russian and Emirati crude signals its adaptation to emerging financial realities and its willingness to reduce exposure to dollar-dominated systems (13).

Food security has also become a major dimension of this pivot. Countries with limited economic capacity and high fertilizer import dependence remain especially vulnerable to supply shocks and price volatility (8). In this context, South-South partnerships provide more equitable and resilient models for agricultural cooperation. India's engagement with Latin America and the Caribbean represents an emerging dimension of food security cooperation, offering new pathways for trade diversification and agricultural innovation (9).

However, this transition carries significant challenges. Governance deficits across parts of the Global South continue to hinder deeper integration, often due to dependence on unearned income and weak institutional structures (10). Strengthening fiscal transparency and accountability remains critical if South-South cooperation is to mature into a credible alternative to traditional power structures.

India's role has evolved significantly—from a leader of the Non-Aligned Movement to a central actor in contemporary South-South cooperation (14). As traditional alliances weaken and multipolarity deepens, India's Global South pivot positions it not merely as a participant in this transition, but as one of its principal architects, shaping a new framework of cooperation, equity, and agency for the developing world.

HORMUZ CRISIS : PERFECT THEATRE TO EXERCISE THE STRATEGY

The Strait of Hormuz crisis presents India with a rare strategic theatre in which its evolving foreign policy doctrine is put to practical test. More than a regional disruption, the crisis reinforces the value of India's multi-vector engagement by allowing it to maintain flexibility, preserve bilateral relations across competing powers, and protect its strategic interests under conditions of uncertainty. In this sense, the crisis is not merely a challenge for India, but an opportunity to operationalize its strategic framework.

India's relationships in West Asia are built on shared interests in energy security, trade, and diaspora linkages (1). These ties span multiple actors, including Iran, Saudi Arabia, the United Arab Emirates, Israel, and Western powers. Unlike alliance-based states constrained by bloc politics, India's issue-based diplomacy allows engagement with each actor independently according to strategic necessity. This has proven particularly relevant in the Hormuz context, where siding decisively with one actor risks damaging vital economic and diplomatic relationships.

India's active role in promoting stability in West Asia reflects the practical impact of this approach (1). By maintaining balanced ties with both Western powers and Russia, India has preserved diplomatic equilibrium, enabling it to act independently while sustaining access to

multiple strategic centres. This flexibility has become increasingly important in a geopolitical environment where conflicts are no longer linear or isolated.

The Hormuz crisis also highlights why rigid alliance blocs would constrain India's strategic space. Formal alliances often bind states to priorities that may diverge from their own national interests. For India, whose strategic partnerships frequently involve actors in direct conflict with one another, preserving room for maneuver remains essential. Its ability to sustain relations simultaneously with the United States, Iran, the Gulf states, and Russia demonstrates the practical advantage of strategic flexibility over bloc dependence.

From an operational perspective, the Strait of Hormuz provides a critical testing ground for adaptive logistical strategies. The proposed AAR (Anticipation, Adaptation, Response) framework is highly relevant here, as the risks associated with this chokepoint are structural (2)(3). The crisis demonstrates the necessity of all three capabilities functioning simultaneously: anticipating disruptions, adapting through alternative routes, and responding through strategic reserves and coordinated policy mechanisms (3). This operational flexibility closely aligns with India's broader strategic doctrine.

At an ideological level, India's diplomatic approach continues to reflect the principle of Vasudhaiva Kutumbakam, reinforcing its image as a responsible actor prioritizing peace, dialogue, and collective stability over confrontation (6). Within the context of Hormuz, this philosophical foundation strengthens India's ability to frame itself as a stabilizing force rather than a partisan participant.

This responsibility carries broader implications for the Global South, many of whose economies remain vulnerable to disruptions in energy and fertilizer supply chains. For India, whose leadership increasingly extends beyond national interests, navigating the Hormuz crisis responsibly also becomes a test of its credibility as a representative of wider developing-world concerns.

Ultimately, the Strait of Hormuz crisis represents the ideal strategic theatre for India's evolving foreign policy. It tests India's capacity to preserve flexibility, maintain issue-based partnerships, and translate strategic autonomy into practical resilience under conditions of geopolitical stress.

COUNTERING RHETORIC WITH REALISM

India's engagement with the Global South is often framed in moral, historical, and developmental terms. However, beneath this rhetoric lies a deeply realist strategic foundation. From a realist perspective, India's Global South policy can be understood through the lens of geopolitical interests and power balancing (1). While the language of solidarity, cooperation, and shared development remains central to its diplomatic messaging, India's practical approach reveals a far more grounded pursuit of strategic influence.

Realist theory provides valuable insight into India's strategic calculations within the Global

South framework (1). In this context, India seeks not only to expand its influence but also to counter the dominance of major powers, particularly in regions where it holds historical, economic, and strategic interests (1). Its growing engagement with Africa, Latin America, and Southeast Asia therefore reflects not merely developmental outreach, but a deliberate effort to consolidate strategic presence and expand geopolitical leverage.

The Strait of Hormuz crisis reinforces this realist logic. As a structural chokepoint, Hormuz remains a site of persistent geopolitical pressure and vulnerability (3). In such an environment, supply chains are increasingly exposed to disruption by both state and non-state actors, requiring resilience rather than efficiency (3). For India, this highlights a core strategic reality: its energy security challenge is not simply about diversifying suppliers, but about managing structural import dependence that leaves its economy vulnerable to external shocks.

This vulnerability extends beyond energy into agriculture and food security. Rising fertilizer costs directly affect production planning, increase financial pressure on farmers, and reduce agricultural margins (8). These consequences emerge long before food prices rise, illustrating how external geopolitical disruptions can reshape domestic economic stability (8). Such vulnerabilities reinforce the strategic necessity of diversified external partnerships beyond traditional security frameworks.

The crisis simultaneously exposes the limitations of hard power as a long-term solution. Military intervention may produce tactical gains—damaging military capabilities, disrupting proxy networks, or delaying strategic ambitions—but the structural instability it creates is often far more enduring (5). For India, whose economic and strategic interests depend on stable maritime routes and regional order, such instability directly threatens national resilience.

India's strategic worldview offers an alternative framework through the principle of Vasudhaiva Kutumbakam, which may be understood as a form of moral realism (6). Rather than rejecting power politics, this approach reframes them through cooperation, dialogue, and mutual security while preserving strategic pragmatism. It contributes to non-Western approaches to international relations by combining ethical interdependence with practical statecraft.

India's realism, however, is not idealistic. It acknowledges that strategic autonomy requires diversified partnerships, economic flexibility, and credible development cooperation. Trade, capacity building, technology sharing, and concessional projects have become essential tools of India's engagement with the Global South (14). These mechanisms serve developmental objectives while simultaneously expanding India's influence and reducing dependence on traditional Northern systems.

Ultimately, India's Global South strategy demonstrates that rhetoric and realism are not contradictory, but deeply interlinked. Its diplomatic language of solidarity and shared progress remains underpinned by hard strategic logic. In a world shaped by recurring crises, fragmented alliances, and structural vulnerabilities, India's ability to combine moral legitimacy with realist adaptability may prove to be its greatest strategic advantage.

CONCLUSION

The 2026 Strait of Hormuz crisis has reaffirmed the extent to which strategic maritime chokepoints continue to shape the global economy and politics.

For India, the crisis has highlighted the depth of its structural vulnerabilities, particularly in energy dependence, industrial supply chains, fertilizer imports and food security. These vulnerabilities demonstrate that disruptions in critical trade corridors are direct national security concerns.

At the same time, the crisis has revealed broader fractures within the international system. Contradictions in Western strategic responses, the vulnerabilities of Gulf states, and the limitations of rigid alliance structures reflect a world increasingly moving toward fragmentation and multipolarity. In such an environment, resilience depends not solely on military or economic strength, but on strategic flexibility and diplomatic adaptability.

India's evolving foreign policy framework, centred on strategic autonomy and multi-vector engagement provides a practical response to these shifting realities. Its ability to maintain relations across competing actors while advancing issue-based partnerships reflects a significant departure from bloc-centred diplomacy. The Global South pivot, therefore, emerges as a strategic mechanism to enhance resilience and expand influence.

Ultimately, the Strait of Hormuz crisis serves as a warning and an opportunity for India, underscoring the urgency of reducing structural dependencies while validating the strategic foresight behind India's contemporary foreign policy.

In an increasingly fractured global order, India's ability to combine realism with diplomatic flexibility may prove critical not only to its own national security, but to the broader reconfiguration of power in the twenty-first century.

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