



## ENERGY, EXPATRIATES, SECURITY. THE HAZY CONTOURS OF INDIA'S POLICY TOWARDS THE MIDDLE EAST

Kingshuk Chatterjee<sup>1</sup>

*University of Calcutta.*

### ***Abstract:***

India has yet to develop a coherent policy towards the Middle East as a whole. Much of India's foreign policy towards countries in the region continues to be bilateral, as before. For a country aspiring to be a major regional power, New Delhi appears extremely cautious about deepening contact with Middle Eastern countries beyond a narrow range of clearly defined 'interests' on an almost exclusively transactional basis. This article aims to identify the three main factors influencing India's foreign policy towards Middle Eastern countries: energy security, the welfare of Indian expatriates in the region, and the diversification of national security and defence interests. It then argues that New Delhi remains wary of engagement where India's own interests are not at stake and that transactionalism limits the scope of Indian engagement in the region.

**Keywords:** India, Middle East, regional policy, energy security, trade in crude, refining crude, refinery technology, expatriate community, remittances, commodities, defence technology, transactionalism, bilateralism, national interests.

***Titulo en Español: Energía, expatriados, seguridad. Los contornos difusos de la política de la India hacia Oriente Medio.***

### ***Resumen:***

*La India aún no ha desarrollado una política coherente hacia Oriente Medio en su conjunto. Gran parte de la política exterior de la India hacia los países de la región sigue siendo bilateral, como antes. Para un país que aspira a ser una gran potencia regional, Nueva Delhi parece extremadamente cautelosa a la hora de profundizar en sus contactos con los países de Oriente Medio más allá de una estrecha gama de «intereses» claramente definidos y basados casi exclusivamente en transacciones. El presente artículo tiene por objeto identificar los tres factores principales que influyen en la política exterior de la India hacia los países de Oriente Medio: la seguridad energética, el bienestar de los expatriados indios en la región y la diversificación de los intereses de seguridad nacional y defensa. A continuación, se argumenta que Nueva Delhi sigue mostrándose cautelosa ante cualquier compromiso en el que no estén en juego los propios intereses de la India y que el transaccionalismo limita el alcance de la participación india en la región.*

***Palabras Clave:*** India, Oriente Medio, política regional, seguridad energética, comercio de crudo, refinación de crudo, tecnología de refinería, comunidad de expatriados, remesas, materias primas, tecnología de defensa, transaccionalismo, bilateralismo, intereses nacionales.

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<sup>1</sup> Kingshuk Chatterjee is Professor in the department of History, University of Calcutta.

E-mail: <kchat18@gmail.com>

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## 1. Introduction

In the three decades since liberalisation of Indian economy in the 1990s, India's policy towards the Middle East has continued to develop along a uniform trajectory regardless of the party in power. After a long period of allowing India's relations with the countries in the region be influenced seemingly by their intimacy with Islamabad, India finally stepped out of its 'South Asia box' and developed a policy dynamic that was driven by pragmatism instead of the Pakistan fixation. In the years that followed India went on to focus major attention to the Arab shores of the Persian Gulf as a region, without compromising its old ties to the north of the Gulf. At the same time, India developed new ties with new allies like Israel, in ways that were beyond imagination before the 1990s.

The Modi government has deepened India's involvement with the region further. PM Modi has been all around the Gulf in his first term itself, and has become the second Indian PM to visit Saudi Arabia. In 2024 at least two temples have come to be built for Hindu expatriates in UAE – one in Dubai and one in Abu Dhabi.<sup>2</sup> With the coming of the ME Quad (India, Israel, UAE and USA) in 2021, and the proposed India Middle East Europe Economic Corridor (IMECO) the possibilities of still closer economic relationship with the region is opening up very fast. India has already signed Comprehensive Economic Cooperation agreement with UAE, and has steadily over the last 30 years deepened its trade ties with Israel. The Comprehensive Economic Partnership Agreement signed with Oman (December 2025) is Oman's first bilateral free-trade agreement, and the PM Modi became the first Prime Minister of India to visit the Kingdom of Jordan.

And yet, it is a difficult task to speak of a coherent Indian policy towards the Middle East as a region. Much of the steady expansion in the ambit of India's foreign policy towards the countries of the region has tended to be more often at a bilateral basis than either a multilateral one and, least of all, of a regional kind.<sup>3</sup> For a country that aspires to be a major regional power, and is clearly desirous of increasing its footprints in its extended neighbourhood, New Delhi appears extremely wary of engaging with the Middle East as a region, and even of deepening the level of contact beyond a narrow range of clearly identified 'interests' on an almost exclusively transactional basis.

This paper means to identify the three principal drivers of Indian foreign policy towards the countries of the Middle East – considerations of energy security, preoccupation with Indian expatriates in the region, and interest in diversifying the profile of national security and defence. The paper then goes on to argue that despite broadening the ambit of her exchanges with the regional countries, New Delhi has studiously refrained from any interaction where the immediate transactional benefits for the country are less than obvious. The paper then reflects on whether the possibilities generated by the recent expansion of horizons of Indian policy are potentially hobbled by India's characteristic transactionalism, or whether that very transactionalism serves to insulate India from the larger uncertainties that tend to characterise the region's politics.

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<sup>2</sup> These two were the first temples to be built in UAE after the one in Bar Dubai in 1958. There have been other temples erected in Oman (two), Bahrain and Iran in previous centuries, in order to cater to the expatriate population from South Asia.

<sup>3</sup> Chatterjee, Kingshuk (2019): "India's West Asia Policy During the Modi Era", *Revista UNISCI*, n° 49 (January 2019), at <http://www.unisci.es/wp-content/uploads/2019/01/UNISCIDP49-13KINGSHUK.pdf>, <https://doi.org/10.31439/unisci-43>



## 2. The Energy Factor

The most important driver of Indian policy towards the countries of the Middle East has been India's consideration of energy security. India has historically been dependent on crude imports to meet nearly 90% of her requirement of oil, and has obtained a reasonably large share of her crude imports from the oil-rich states of the Persian Gulf. In the first three decades after independence, India continued to import the bulk of her crude from there till it was badly disturbed during the Iraq-Iran war in the 1980s. In the 1990s, India undertook a course correction by setting about a policy of diversifying the purchase of increasingly large volumes of crude from regions other than the Middle East, so that the country's economy could be insulated from disruptions in regional supply. In pursuit of that policy, India has been steadily reducing its total quantum of crude import of the region from over 75% of its total crude imports to the present share of 42-43%, by considerably increasing oil imports from Russia (36.3%) and even the USA in the calendar year 2025.<sup>4</sup>

However, at no point in the past hundred years or so has Indian crude imports from the Middle East fallen below 40% of the country's total crude intake, and that is not likely to change in the short and medium terms.<sup>5</sup> Since much of Indian refinery capacity during the last phase of British rule was built up to process crude from the northern side of the Persian Gulf, i.e. Iraq and Iran, where the British oil interests used to be concentrated, Indian have historically been better suited to processing the medium-to-heavy sulphurous crude from the north side of the Gulf, as against that coming from the south. While this resulted in India buying a bigger share of its crude imports all the way through the 1990s and 2000s from mostly Iraq and Iran, disruption in the supply of oil from both those countries made India diversify her imports from elsewhere.<sup>6</sup> With the supply from Iraq reducing after the Iraq War of 2003 and from Iran after the 2010 international sanctions regime on account of its suspected nuclear programme, Saudi Arabia came forth with a heavy investment in India's refinery capacity at Jamnagar to better equip India for the processing of as many as 216 different grades of crude.<sup>7</sup> This being done with the understanding that India would wean herself from Iranian crude and buy Saudi crude instead, India gradually reduced her purchase from Iran, and increasing that from Saudi Arabia so that by 2017 Riyadh became the single largest source (18%) of Indian crude imports, before being pushed back by Russia and Iraq to the third spot in 2023.<sup>8</sup>

The other important factor in this dependence on oil imports from the region happens to be geographical proximity of the oil rich states of the Persian Gulf, which makes the transportation costs from the Gulf countries to India among the lowest. For obvious reasons, the cost of transportation of shipping crude from the countries in and around the Gulf is exponentially cheaper than importing crude from geographically distant countries like Russia,

<sup>4</sup> Kala, Rishi Ranjan: "Russia, Middle East account for over 80% of India's crude oil imports in November", *Business Line*, 2 December 2025, at <https://www.thehindubusinessline.com/markets/commodities/russia-middle-east-account-for-over-80-of-indias-crude-oil-imports-in-november/article70350162.ece>

<sup>5</sup> "INTERVIEW: India's crude diversification push won't impact Middle Eastern term contracts", *S&P Global*, 2 June 2025, at <https://www.spglobal.com/energy/en/news-research/latest-news/crude-oil/061025-interview-indias-crude-diversification-push-wont-impact-middle-eastern-term-contracts>

<sup>6</sup> Pradhan, Sanjay Kumar (2020), *India's Quest for Energy Through Oil and Natural Gas: Trade and Investment, Geopolitics, and Security*, Singapore, Springer Nature, pp 18-27.

<sup>7</sup> Mathr, Shubhangi, "25 years of Jamnagar refinery: How RIL redefined the petrochemical landscape of India", *Moneycontrol*, 3 January 2025, <https://www.moneycontrol.com/news/business/25-years-of-jamnagar-refinery-how-ril-redefined-the-petrochemical-landscape-of-india-12902976.html>,

<sup>8</sup> "Insights into Import of Crude Oil and International Crude Oil prices", Directorate General of Commercial Intelligence and Statistics, Ministry of Commerce, Government of India, New Delhi, October-November 2025, at <https://www.dgciskol.gov.in/writeraddata/Downloads/20251024153605Insights%20into%20Import%20of%20Crude%20Oil%20and%20International%20Crude%20Oil%20prices%20.pdf#:~:text=The%20top%20five%20major%20import%20sources%20of,slight%20decline%20to%2035.8%25%20in%20FY%202024%2D2025>



USA, or any other. Short of highly discounted rates (such as those being offered by Russia for the last several years),<sup>9</sup> oil from the countries of the region would almost routinely prevail in terms of competitive costs.

A third dimension, seldom highlighted but no less significant, is the expertise India has developed in refining crudes of all types. For nearly five decades since 1947, perpetually starved in terms of foreign exchange, India was accustomed to often buying the worst quality crude and then refine it to usable grade. From the 1990s, as the country with the eighth largest installed refining capacity India has often functioned as refiner of crude for a number of Middle Eastern countries including Iran, before processing it and sending it back to the country of origin.<sup>10</sup> Till 2010, Iran relied heavily for India to refine crude for the market in Islamic Republic. Upon India gradually pulling out as international sanctions regime was tightened upon Iran, the Islamic Republic began investing in developing its own refinery capabilities.<sup>11</sup> Around the same time, Saudi Arabia also tried to develop its own refinery capabilities to reduce their own dependence on foreign refineries. However, the installed refinery capacities still do not match the requirements of the region. This leaves a room for India, which has further grown into the country with the fifth largest installed refinery capacity and the seventh largest exporter of refined crude in return for either hard currency of discount on oil purchase.<sup>12</sup>

On account of all these factors, in the short to medium terms, the Middle East is likely to be the most competitive source of crude purchase for India and therefore central to the country's energy security. It is largely because of such considerations, that India resumed its imports from Iraq soon after Iraq resumed exports after the fall of Saddam Hussein. Similarly, even though India steadily reduced her oil imports from Iran from nearly 18-19% in 2018 to almost zero in 2022-24, stake-holders in the country's oil sector have persisted in seeking either waiver from sanctions, or gently nudged all concerned in the government to work towards resuming oil imports.<sup>13</sup> Countries in the region too have traditionally worked on increasing their energy exports to India, and have routinely offered India more favourable oil price discounts – in a bid to ensure that India, one of the largest markets with a growing appetite for oil, would try to meet much of her expanding energy needs from those countries.

The mutual dependence between the oil rich countries of the Middle East and India, thus, has developed into a firm bond tying both New Delhi and the regional capitals. Until such time as transport vehicles move totally out of oil and gas, this is unlikely to change. Thus, oil-rich countries of the Middle East will continue to be pivotal to Indian considerations of energy security, and thus be a regular factor in the New Delhi's policy towards the countries in the region.

### **3. The Expatriate Factor**

While energy has remained the cardinal factor in India's relations with the Middle Eastern countries, the large number of expatriate Indians working in the countries of the Middle East, and in particular the Persian Gulf, have become an increasingly important factor in the relations in the last three and a half decades. Skilled and unskilled workers alike from India constitute a

<sup>9</sup> Sharma, Sukalp, "Moscow's oil helped India save \$12.6 billion in 39 months; presumptive savings likely much higher as Russian oil imports kept global prices in check", *The Indian Express*, 2 September 2025, <https://indianexpress.com/article/business/india-russia-oil-savings-imports-global-trade-prices-10223321/>

<sup>10</sup> Clarke, Kieran, Graczyk, Dagmar: "India's Downstream Petroleum Sector: Refined Product Pricing and Refinery Investment", International Energy Agency, Working Paper, 2010, Paris, IEA/OECD, pp. 39-50

<sup>11</sup> "Iran Refining Capacity Set to Grow by 180,000 b/d this year", *Iran Petroleum*, n° 148, March 2025, pp. 9-11, at <https://files.iranpetroleum.ir/2132.pdf>

<sup>12</sup> "India's Petroleum Industry, Fuelling Growth and Innovation", Ministry of Petroleum & Gas, Press Briefing 27 January 2025, at <https://www.pib.gov.in/PressReleasePage.aspx?PRID=2096817&reg=3&lang=2>

<sup>13</sup> An Indian oil sector operative, in conversation with the author, on condition of anonymity, Kolkata, June 2023.



major demographic component of the population of the Persian Gulf, especially in sparsely populated oil-rich states of the Persian Gulf – in some cases (such as in UAE) constituting a demographic group larger than the citizenry.<sup>14</sup> Initially lacking the heft to influence regional policy towards the expatriate population in any significant manner, New Delhi has become increasingly more mindful of the expatriate population in the region, changing the dynamics of the relationship with the region altogether.

People from the Persian Gulf as much as those from the Indian subcontinent (especially from the western coast and the peninsular south) have, of course, ventured in and around their respective territories for a very long time, occasionally even settling down. Merchants from the Arabian Peninsula, Persian Gulf and the Gujarat coast have been trading all around the Indian ocean for centuries before the modern times. From the early twentieth century, as the present territorial contours of the modern states began to come into being, the fluidity of such movements reduced dramatically, subjecting them to controls that were unprecedented.

From around the 1960s, as the oil rich states began to assume sovereign control over the oil resources in their respective countries from the European and American oil companies that had dominated the trade till then.<sup>15</sup> One of the most momentous changes that followed was the exponential growth in the wealth at the disposal of the oil economies of the region, which – through various mechanisms of redistribution – served to raise the material standards of life in the region, making available a huge range of manufactured goods from around the world. This, in turn, totally transformed the nature of the region's economies, generating demands for labour for industrial production and the service sector that could not be satisfied by the skill-sets of the population of the various countries.<sup>16</sup> Accordingly, by the early 1970s, a huge number of immigrant workers began to enter the petroleum economies of the Gulf from various Asian countries, with Indians being among the largest demographic entities in countries like Saudi Arabia, United Arab Emirates, Kuwait and Qatar – providing both skilled and unskilled labour.<sup>17</sup>

Most of such skilled and unskilled labour-force was allowed in on a term-bound contractual basis into the Gulf countries. As it happens almost invariably, when expatriate workers are denied any path to citizenship rights, they tend to remit all their savings back home along with any range of commodities that may not be available back home, while spending a large portion of their consumption from their country of origin (buying things that they particularly favoured, or things that they could not afford earlier). By the 1990s, as India began liberalisation of its economy, remitting money back home was made easier – helping overcome the shortage of foreign exchange reserves that hobbled Indian economy till then. This prompted the Indian government to begin a systematic outreach to Indian diaspora and expatriate workers overseas, which have increased in scale and scope India's engagement with the Indian

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<sup>14</sup> The six states of the Gulf Cooperation Council hosted nearly 9 million Indian during 2024, with UAE having the largest number of Indian expatriates (over 3.4 million), followed by Saudi Arabia (2.6 million), Kuwait (1.03 million), Oman and Qatar (over 0.7 million each), and Bahrain (over 0.3 million). See Sachdev, Mahesh: "Thriving and Troubled Yet Unsettled: Challenges Faced by the Indian Diaspora in the Middle East", *India's World*, 14 May 2025, at [https://indiasworld.in/thriving-and-troubled-yet-unsettled-challenges-faced-by-the-indian-diaspora-in-the-middle-east/#:~:text=The%20MEA%20estimates%20that%20over%20a%20quarter,states%20of%20the%20Gulf%20Coperation%20Council%20\(GCC\).](https://indiasworld.in/thriving-and-troubled-yet-unsettled-challenges-faced-by-the-indian-diaspora-in-the-middle-east/#:~:text=The%20MEA%20estimates%20that%20over%20a%20quarter,states%20of%20the%20Gulf%20Coperation%20Council%20(GCC).)

<sup>15</sup> Chatterjee, Kingshu: "The Oil Shock and its Aftermath: How the 1970s Reshaped Global Politics" in Nandi, Syantan and Deb, Indrani (2025): "*the Seventies: Turbulence to Transition*", Kolkata: Avenel Press, pp. 33-36.

<sup>16</sup> Tuma, Elias H. : "The Economies of the Middle East," in Deborah H. Gerner (ed) (2000): *Understanding the Contemporary Middle East*", Boulder, CO, Lynne Rienner, pp. 219-30.

<sup>17</sup> Wiedmann, Florian, Salama, Ashraf, (2019): *Building Migrant Cities in the Gulf: Urban Transformation in the Middle East*, London: I.B. Tauris.



communities over time in the oil rich countries of the Middle East. Liberalising of trade practices have also facilitated Indian expatriate workers importing commodities of their taste and preference from India, significantly adding to both Indian exports and impacting foreign exchange reserves by redressing the imbalance that characterised India's balance of trade with the region on account of its huge expenditure on importing oil from the region.

The Gulf accounted for 15.8% of India's total foreign trade in 2022-23,<sup>18</sup> and expatriates based in the six GCC states remit nearly \$48 billion from the region.<sup>19</sup> Under NDA 1, India engaged with GCC for the first time with an eye to developing substantive economic relations. GCC admitted India as a dialogue partner in 2003 (after US and Japan). In 2004 a landmark agreement was concluded to extend cooperation in trade, investments, industrial cooperation and technology transfer. But, barring the GCC, India has not really ventured out in the direction of multilateral diplomacy.<sup>20</sup> With what now appears to be the unravelling of the GCC, this investment has been appearing to be of doubtful potential for some time.

As a whole range of commodities began to be made available for the Indian-origin consumers of the Gulf markets, other demographic groups (including first Pakistani, Bangladeshi, Sri Lankans, and then other Asian peoples as well, including the Gulf Arabs themselves in some cases) began to lodge their demands as well, helping to expand the possibilities of commercial exchanges progressively.<sup>21</sup>

The nature and scale of the change is best exemplified in the veritable lift-off in India's relationship with the Kingdom of Saudi Arabia. Well into the 1970s, India's relations with Riyadh were limited to transporting of Hajj and Umrah pilgrims, and India's imports of petroleum and other petrochemical commodities, etc. In the last decade or so, New Delhi and Riyadh have steadily expanded bilateral exchanges, so that they are at present very important trading partners for each other. Saudi Arabia is India's third largest supplier of India's energy imports (over 18% of crude imports since 2017). Indo-Saudi trade peaked in 2017 (\$48.62 billion) and is now averaging around \$45 billion. Saudi Arabia is eighth largest destination of Indian exports, while India is the fifth largest destination for Saudi exports; India is the third largest source of Saudi imports as well. India-Saudi Arabia trade is robust and growing, with bilateral trade hitting around \$43 billion in FY 2023-24, making Saudi Arabia India's fifth largest partner and India Saudi's 2nd largest.<sup>22</sup>

Some of this change is on account of the transformation in the character of the global energy trade. The discovery of shale oil and fracking technology virtually halved global oil prices by 2014, allowing USA to reduce its dependence on imports from the Middle East. Bereft of its steadiest consumer in the global market, Saudi Arabia then turned to the next two – China and India. As previously mentioned, Riyadh assisted India in the switchover of India's

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<sup>18</sup> Solanki, Viraj "the Gulf Region's Growing Importance for India", *International Institute for Strategic Studies*, 21 February 2024, <https://www.iiss.org/online-analysis/online-analysis/2024/02/the-gulf-regions-growing-importance-for-india/#:~:text=Energy%2C%20trade%20and%20ensuring%20the,mid%2D2023%20indicating%20a%20recover y.>

<sup>19</sup> Kumar, Sanjay, "Despite small diaspora share, Gulf-based Indians send home 40% of remittances", *Arab News*, 19 April 2025, <https://www.arabnews.com/node/2597684/world>

<sup>20</sup> Chatterjee, Kingshuk, "India's Relationships with the Gulf Region: Prospects and Possibilities in the 21<sup>st</sup> Century", in Ghosh, Anjali, Chakraborti, Tridib, Majumdar, Anindya Jyoti, Shibashishis Chatterjee (eds) 2009, *India's Foreign Policy*, New Delhi, Pearson, pp. 368-69.

<sup>21</sup> Chatterjee, Kingshuk, "India and West Asia: the Bridge that Remains to be Built", in N.K. Mahawar, Dhruvajyoti Bhattacharjee, (eds) (2023), *India's Development Partnership: Expanding Vistas*, New Delhi, ICWA/KW Publishers, pp. 116-17.

<sup>22</sup> "India-Saudi Arabia Bilateral Brief", Ministry of External Affairs, at [https://www.mea.gov.in/Portal/ForeignRelation/India-Saudi\\_Arabia.pdf](https://www.mea.gov.in/Portal/ForeignRelation/India-Saudi_Arabia.pdf)



refinery technology platform (particularly in the installation in Jamnagar ), following up with considerable investments in Indian refineries from 2018. India currently imports \$27 billion worth of commodities, of which as much as \$23 billion being oil and oil products. Riyadh now means to broaden this to include non-oil exports such as automobiles (viz. Saudi Arabia manufactures and exports Renault, Mercedes and Volvo under international licence). Indian exports to Saudi Arabia stand at \$7 billion (including \$2 billion worth refined petroleum), cereals (\$1billion), machineries, iron and steel, automobiles, basmati. Items like pharmaceuticals, IT, agricultural technology and financial services (viz. digital payments aiming primarily, but not exclusively at expatriate Indians) are now being identified as promising areas of expansive growth.<sup>23</sup> More importantly over 3 million Indian expatriates work in Saudi Arabia – single largest group of expatriates anywhere in the world, generating demand for commodities that only India can provide (viz. basmati rice, entertainment).<sup>24</sup>

#### **4. The Security Factor**

The third factor that has been helping shape Indian policy towards some of the countries of the Middle East has been considerations of India's national security. Virtually as a coincidence, like the two other factors discussed above, national security considerations too began to be increasingly factored into Indian foreign policy towards Middle Eastern countries only from the 1990s, albeit not on account of liberalisation of the Indian economy.

For a very long time little strategic value used to be associated to the countries of the Middle East in terms of India's national security, being located beyond the immediate neighbourhood of India's 'South Asia Box.' The principal consideration in the first four years of Indian foreign policy had been 'the Pakistan fixation' – any country deemed to be close to Islamabad was treated with some suspicion.

Such a disposition left the Indian government hamstrung in dealing with crisis situations that could arise in moments of uncertainty. One of the most dramatic of such crises unfolded when in 1990, Saddam Hussein's Iraqi forces ran over Kuwait. In the months of occupation, Indian expatriate workers based in both the countries were stranded. While Indian diplomatic operations remained open and functional in the friendly capital of Baghdad, they swiftly shut down in Kuwait City, to the great distress of Indian expatriates in Kuwait. New Delhi eventually succeeded in evacuating 176,000 Indians from Kuwait through the good offices of the embassy at Baghdad, made possible largely through the support India managed to gain from Saddam Hussein himself. Had that support not been forthcoming, success may have eluded New Delhi.<sup>25</sup> Commendably, New Delhi took the right lessons from the debacle in Kuwait (and the success in Baghdad) – that India needs develop capacity for evacuation of stranded expatriates all across the region. Since then, New Delhi has been steadily worked at developing diplomatic ties in the wider region that would preclude the kind of predicament that India encountered in Kuwait. An early instance of success in this regard was seen in 2006, when India successfully evacuated over two thousand stranded expatriates from Lebanon in the face of Israeli bombardment.<sup>26</sup> A major success was scored later in 2015 in Yemen, in course of the

<sup>23</sup> Chatterjee, Kingshuk, (2017), "India-Saudi Arabia Trade Relations: the Sky is the Limit", *the Diplomatist: Extraordinary and Plenipotentiary, A Special Report*, pp. VIII.

<sup>24</sup> 35 TV channels beam dubbed Indian programmes into SA; with introduction of cinema in 2018, first two films were the Tamil film Kaala and Akshay Kumar's Gold

<sup>25</sup> "Airlift: Not lifted from facts", Gateway House Indian Council on Global Relations, at [https://www.gatewayhouse.in/airlift-not-lifted-from-facts/#:~:text=As%20Joint%20Secretary%20\(Gulf\)%2C%20I,evacuation%20by%20air%20in%20history.](https://www.gatewayhouse.in/airlift-not-lifted-from-facts/#:~:text=As%20Joint%20Secretary%20(Gulf)%2C%20I,evacuation%20by%20air%20in%20history.)

<sup>26</sup> Acharya, Bhargav, "The Indian Navy and India's Overseas Citizens: Operations Sukoon and Rahat," National Maritime Foundation, 22 May 2017, <https://maritimeindia.org/the-indian-navy-and-indias-overseas-citizens-operations-sukoon-and-rahata/>



turmoil following the toppling of the President Mansur Hadi regime by the Houthi rebels, when Indian navy went on to rescue over 4,000 Indians stranded in Yemen.<sup>27</sup> But perhaps the most dramatic achievement in terms of expatriate security was seen in 2015 when Da'esh (Islamic State) operatives in Iraq abducted more than 40 nurses from Kerala. Diplomatic contacts long nurtured by the Ministry of External Affairs ensured negotiated release of each and every one of those abductees.<sup>28</sup>

Around the same time, India broadened its definition of national security horizons in the context of the crisis unfolding in Afghanistan in the 1990s, in the process reviving India's relationship with Iran after a period of frostiness that set in after the Islamic revolution of 1979. In the 1990s, in the wake of Soviet withdrawal from Afghanistan, India and Islamic Republic of Iran came to support common friends (Ahmed Shah Masood and Burhanuddin Rabbani) and confront common enemies (Gulbuddin Hekmatyar and the Taliban).<sup>29</sup> These ties developed in post-Taliban Afghanistan, when Iran began to play a major role in India's geostrategic calculations, investing in the port of Chabahar and then the Zaranj-Delaram highway as a way of reaching aid and support into Afghanistan, bypassing Pakistan.<sup>30</sup> India and Iran have built on that understanding to help India gain access to the Central Asian region through Iran, while India facilitated Iran's entry into both BRICS and the Shanghai Cooperation Organisation. The strategic convergence between New Delhi and Tehran virtually guarantees that the present drift in India's relation with Tehran over stoppage of crude purchase on account of international sanctions regime is neither durable nor sustainable in the long term.

India's growing intimacy with Israel, also, has been given a major boost by considerations of national security, particularly in the last decade or so. If there is any component of Indian foreign policy where the Government of India under Prime Minister Narendra Modi has gone well beyond the limits of previous relationships, it is with reference to the state of Israel. Modi was the first Prime Minister to have visited Israel, and has consistently given all to understand that he sees Israel as a strategic partner, rather than an ally who has to be kept under wraps. PM Modi's 2017 Israel visit was a major point of departure, because of the open embrace of Israel as a strategic partner, even before India joined Israel in Quad. Indeed, there is reason to consider this deepening of ties a natural progression of foreign policy direction pursued by New Delhi since 1992.<sup>31</sup> But the real blossoming is in the realm of defence cooperation. Starting from scratch, Israel has become the third largest source of defence imports, with average annual purchase of more than a billion dollars' worth.<sup>32</sup> Israel is helping overhaul India's defence capabilities (plus surveillance), and plays a crucial role in New Delhi's eventual objective of entering into defence relationship with the US without jeopardising the existing relationship with Russia – while Russian and American defence

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<sup>27</sup> *Ibid.*

<sup>28</sup> "Indian nurses stranded in Iraq return home," *Al Jazeera*, 5 July 2014, <https://www.aljazeera.com/news/2014/7/5/indian-nurses-stranded-in-iraq-return-home>

<sup>29</sup> Abedin, Mahan, "How Iran Found its Feet in Afghanistan", *Foreign Affairs*, 24 October 2019, <https://www.foreignaffairs.com/articles/afghanistan/2019-10-24/how-iran-found-its-feet-afghanistan>

<sup>30</sup> See Hughes, Lindsay, *Bypassing Pakistan: Afghanistan, India, Iran and Chabahar*, <http://www.futuredirections.org.au/publication/bypassing-pakistan-afghanistan-india-iran-chabahar/>

<sup>31</sup> India's non-defence bilateral trade with Israel trebled from \$200 million (1992) to \$6.53 billion, averaging \$4 billion since 2012. Israel has been helping Indians with irrigation and water management technology since 2006 Agreement for Agricultural Cooperation.

<sup>32</sup> Kuo, Mercy, "India-Israel Defense and Security Cooperation", *The Diplomat*, 19 November 2024, <https://thediplomat.com/2024/11/india-israel-defense-and-security-cooperation/>



platform are mutually incompatible in terms of technology, Israeli platforms can be customised to be compatible to both, and thus can help bridge the gap.<sup>33</sup>

India's participation in the still fledgling 'Western' Quad, aka I2U2 (i.e India, Israel, the U.S. and the U.A.E.) could be a major advance in raising the country's strategic profile in the region. Traditionally favouring bilateralism in its dealing with foreign powers, the Quad is only the second time (the first being the GCC) that India seems to be developing a regional focus towards the Middle East. Although New Delhi wants to see in the Quad primarily a means of closer economic engagement with its partners in this body, the strategic intent of its partners in the organisation the organisation is not altogether lost on Delhi. The Quad, thus, constitutes a good example of India stepping outside its "South Asia box," as ambitious thinkers have been talking of this as Indian aspiration of a global power. Others would see this more as a baby step in the direction of devising a coherent policy towards the Middle East as region.<sup>34</sup> While considerable hesitation characterises New Delhi's response to factor defence and strategic alignment into the Quad, strategists are hoping that India would be able to facilitate and become a part of a regional security infrastructure that could be evolving. Such optimism stems from India's new-found keenness in contributing to maritime security with her naval capabilities, as evinced in her anti-piracy operations against Somali pirates and operations even against Houthi attacks on shipping in the Red Sea in the background of the Gaza conflict.<sup>35</sup>

### **5. The Factor of Transactionalism**

Even as India has, evidently, broken major grounds in the region, and is showing commendable energy in getting its interests addressed, Indian policy towards the region itself has invariably been shaped by reaction, inaction and caution in the face of developments that do not affect India directly – not unlike the period before the 1990s. New Delhi has always favoured responding to developments in the region in defence of India's interests, and Indian interests alone. What is worse, nobody expects India to be different in any way – as in the years before. Such a reputation does not behove a country with the aspirations of regional power status, as India has periodically been asserting for the last several years.

In the first four decades after independence, despite having the opprobrium of 'idealist' in its foreign policy, India used to studiously keep itself away from most conflicts worldwide, and focused itself on its own economic development. Despite the personal aspirations of Prime Minister Nehru of steering Asian and African countries away from the shadow of the Cold War, India's economic and military weakness did not allow New Delhi to claim much of a stature in global politics. Accordingly, alongside claiming to belong to neither of the two Cold War Blocs, India earned the reputation of being a country that never takes any sides.

The gradual rise of India in the ranks of global economy in the wake of economic liberalization of the 1990s began to gain India a kind of leverage and economic heft she never enjoyed before that.<sup>36</sup> As Indian economy began to outperform many other hitherto wealthier countries, she appeared as a major market and a global destination of investment capital.<sup>37</sup> As

<sup>33</sup> A member of the Indian diplomatic ecosystem, in personal conversation with the author, on condition of anonymity, New Delhi October 2024.

<sup>34</sup> Khan, Komal, "Decoding I2U2: India's Middle East Balancing Act and the Arab World's Dilemma", *Strategic Foresight for Asia*, 9 January 2024, <https://strafasia.com/decoding-i2u2-indias-middle-east-balancing-act-and-the-arab-worlds-dilemma/>

<sup>35</sup> Shukla, Ajay, "Indian Navy's Growing Role in Securing the Indian Ocean". *the Diplomat*, 19 September 2025, <https://thediplomat.com/2025/09/indian-navys-growing-role-in-securing-the-indian-ocean/>

<sup>36</sup> Gordon, Sandy (1995), *India's Rise to Power: In the Twentieth Century and Beyond*, New York: Macmillan Press).

<sup>37</sup> Malone, David M., (2011), *Does the Elephant Dance: Contemporary Indian Foreign Policy*, (Oxford: Oxford University Press), pp. 81-86.



more and more countries became willing to engage with India, they became more mindful of Indian interests and sensitivities which they had previously ignored. Accordingly, India began to successfully negotiate better energy prices from global suppliers of crude, improving the profile of her energy security over the last couple of decades.<sup>38</sup> Similarly, as Middle Eastern countries with investible capital come looking for opportunities to invest in one of the world's fastest growing economies, they begin addressing Indian expatriate sensitivities (such as allowing for the erection of Hindu temples in the Gulf countries) on a much greater scale than before.

And yet, New Delhi seldom seems interested in using the leverage for anything beyond its own interests, and almost never to the benefit of even its closest allies in the region. Take for instance the case of Iran, one of India's longest standing allies in the region. Tehran has frequently had reasons to comment on India's hesitation/ reluctance to engage with Iran full throttle. After the relative upswing in relations of the Khatami era, the tight international scrutiny on Tehran's nuclear programme (coming simultaneously with the Indo-US bonhomie during the second term of President Bush) caused New Delhi to step back a bit. During the crucial International Atomic Energy Agency votes of 2005, 2006 and 2009, in a major let-down for Tehran, New Delhi voted for US-sponsored resolutions asking Iran to stop its clandestine nuclear programme in violation of its NPT commitments. India at the time was trying to get close to the US, even as it was negotiating for a natural gas pipeline connection Iran, Pakistan and India. New Delhi decided to hand Tehran out to dry, voting with the US. The incumbent government in Tehran at that time was furious at this, and President Ahmedinejad wanted India to pay a greater price per unit for inclusion in the IPI pipeline – at which stage, India lost interest in the pipeline project. However, when the Chinese offered to step in and buy the excess capacity of gas earmarked for India, despite President Ahmedinejad's personal willingness, the Islamic Republic declined.<sup>39</sup>

An equally serious consideration since then, of course, had been the nature Indian response to the 2010 sanctions regime. The 2010 sanctions regime pushed by the US and EU in tandem involved stoppage of transactions for any company dealing with Iran's oil exports in any way – which meant that any banking, shipping or insurance company involved in purchase or sale of Iranian oil would be unable to deal with any American or European company thereafter.<sup>40</sup> New Delhi's abandoning of Tehran at a time when Tehran was in the corner was noted with some sense of dismay in Tehran, with Indian imports of Iranian crude falling from 19% (2006) to 6% (2014) while that from Saudi Arabia climbed up to 20%. This was quite unlike China, which continued to provide Tehran with refinery services (despite cutting back its own consumption by about half).<sup>41</sup> This has resulted in an across-the-board-consensus in Tehran, that China is a more reliable trade partner than India, having greater capabilities as an independent actor. This ambivalence should rightly have caused India some awkwardness, because when the 2010 sanctions regime kicked in, India could have played in an empty field and won considerable concessions; instead, it chose to wriggle out. That was precisely the time when Beijing remained steadfast, refining nearly two-thirds of the crude that Iran needed

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<sup>38</sup> *Ibid.* pp. 188-90.

<sup>39</sup> There is reason to believe, this was because there were serious reservations in the Tehran establishment about the manner in which China's footfall in Iranian economy was becoming increasingly large. A section of the Iranian establishment, therefore, was determined to keep India involved as a counter-weight to China.

<sup>40</sup> For details, see website of the Office of Foreign Assets control, US Department of Treasury, <https://ofac.treasury.gov/sanctions-programs-and-country-information/iran-sanctions>

<sup>41</sup> Scott, Emma, "Defying Expectations: China's Iran Trade and Investments" Middle East Institute, 6 April, 2016, <http://www.mei.edu/content/map/defying-expectations-china%E2%80%99s-iran-trade-investments>].



refined, replacing India as the largest refiner of crude for the Iranian market.<sup>42</sup> Using banking institutions that had no stakes in global operations, China in fact increased its total volume of purchase of Iranian crude, and also undertook to refining greater volumes of crude for the Islamic Republic. When the JCPOA was signed and Tehran opened up for business, New Delhi resumed looking at Tehran, but for a while Tehran looked away towards Europe – hoping that allowing European powers like France, Germany and UK would make subsequent isolation of Iran by the Americans difficult. At that stage, India tried to re-engage with Tehran playing the Chabahar card, and resuming purchase of Iranian crude. The role of refiner for Iranian crude was, however, lost as apart from Chinese help in that direction, Iran actually set up its own refineries.<sup>43</sup> When the US under President Trump pulled out from the JCPOA in 2018 and reinstated a fresh sanctions regime, Indian oil imports were initially given a waiver for a brief period. But subsequently, as such waivers were ended, India rapidly reduced its purchase of Iranian crude.

On a larger regional scale, India's transactionalism has been causing some awkwardness among India's friends. From the time India began drifting away from Tehran, reducing its oil imports from there, India has grown closer to Saudi Arabia. But even this intimacy is proving transactional. One of the factors prodding Saudi intimacy with New Delhi was to wean India from Tehran's orbit – which explains the strategic reason behind conversion of Jamnagar refinery being funded by Saudi Arabia *after* 2010 sanctions regime was introduced. When King Salman invited India to join the coalition against the Houthis in Yemen in 2015 (largely to wean India away from Tehran), India wisely declined. This did not alienate Riyadh, rather merely increased its determination to wean India away from the Islamic Republic. However, when the Houthis attacked Saudi oil installations in 2019 presumably on Iranian encouragement, and the US restrained itself from retaliation, the Saudis opened a back-channel with Iran. They did not come knocking in New Delhi, reputed to be a friend for both, they went instead to Islamabad. The rapprochement was finally accomplished with mediation by Beijing, as Tehran and Riyadh resumed full diplomatic ties in March 2023.<sup>44</sup> New Delhi sat the crisis out.

No less significant was the remarkable reticence and ambivalence found in Indian position on the Gaza conflict. While India's intimacy with Israel is new-found, India has been a long-term ally of the Palestinians, right from the vote on its partition. Some of the diplomatic community had traditionally thought this was important for India's policy towards the Arabs. India has a major reserve of diplomatic capital with Palestinians. Indeed, India continues to balance Israel and Palestinians, but, curiously, India never tried to mediate between the two the way US or EU have tried to do, let alone Egypt or Qatar. Ever since the outrage of 7<sup>th</sup> October 2023, India has been at pains to play both sides in the conflict. Thus, the Government of India has expressed its solidarity with Tel Aviv in its right to act in self-defence, and also voted routinely for UN resolutions calling for resuscitation of the two-state solution – but did not lift a finger that we know of in negotiating between the two combatant sides. When the Gaza conflict broadened to culminate in the Twelve Day War of June 2025 between Iran and Israel, New Delhi appeared mortified enough to not issue so much as a press release on conflict between its two closest friends in the region. India may not have been able to stop the war by

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<sup>42</sup> "Reliance, others withdraw from Iran, but China replaces them" *Deccan Herald*, 29<sup>th</sup> April 2010, <https://www.deccanherald.com/business/reliance-others-withdraw-from-iran-but-china-replaces-them-63947.html>

Read more at: <https://www.deccanherald.com/business/reliance-others-withdraw-from-iran-but-china-replaces-them-63947.html>

<sup>43</sup> "Iran to construct 12 new oil refineries," *Andalus Ajansi*, 1 February 2017, <https://www.aa.com.tr/en/energy/oil/iran-to-construct-12-new-oil-refineries/3802>

<sup>44</sup> Zhang, Yuan (2024), "Crucial yet Limited: China's Role in the Saudi-Iranian Rapprochement," *Asian Journal of Middle Eastern and Islamic Studies*, 18:3, pp. 243-259, <https://doi.org/10.1080/25765949.2024.2411104> .



interceding between the two, but mere posturing towards an attempt at mediation would have spoken volumes of an aspiring regional power.<sup>45</sup>

One of the most unintended fall-outs of this sitting out on conflicts could be the new proposed port and railroad corridor of India – Middle East – Europe Economic Corridor (IMEC) – which aims at connecting India by sea to the Gulf states, then by railroad to the Mediterranean coast (Israel and Jordan), then again by sea to Greece (and then through rail-road networks to the rest of Europe).<sup>46</sup> Envisaged as a major land-sea commercial network connecting India with Europe, the IMEC was purported to integrate India and the Gulf Countries into the global supply chain, in a way that has not happened since the Portuguese discovery of the sea route to India in the fifteenth century. That and India's support for the induction of countries like Saudi Arabia as a permanent member of BRICS looked like being just the kind of game changer the Gulf countries needed to transform into a post-oil economy and was expected to generate synergy between the Gulf states and Israel in a way that could even have helped to solve the Palestine question – generating enough economic opportunities for all concerned.

However, the IMEC could be now said to have been scuttled by the Gaza conflict. The wanton nature of Israeli response to the Hamas outrages of 7<sup>th</sup> October resulting in the death of over 70,000 Palestinians (mostly unarmed civilians) has made it virtually certain that any further rapprochement between Israel and the Gulf States would not be immediately forthcoming. Being considered friendly by Israel, the Palestinians, Qatar, and Saudi Arabia alike, India could have offered its good offices as an interlocutor. As with the Twelve Day War, given the nature of the conflict, such attempts at opening dialogue may not have worked – but the mere attempt at interlocution would have communicated volumes. It is a pity, that in a year of conflicts in the Middle East, India stuck to its seat on the fence – clearly indicating how it defines the nature of its interests in the region.

## **6. Conclusion: Hazy Contours**

New Delhi has come a great distance from the pre-liberalisation era, when all its concern revolved around the oil that was imported from the Gulf. It now constitutes one of the largest markets for oil from the region, and provides one of the largest body of expatriate workers to the oil economies of the Gulf. Both of these have helped to formulate the contours of India's interests towards the region as a whole. The potential for India's greater involvement in the larger geo-political and security matrices of the neighbourhood have gained acknowledgement from regional powers like Israel, Iran, Saudi Arabia, UAE and even the USA by their attempts at involving India in matters pertaining to security considerations – almost as if India were being enticed to step outside its South Asia box.

However, even though India would want to play a bigger role in the region of the Middle East, it would not want to either jeopardise its 'strategic autonomy' or take sides in a conflict over issues that have no direct repercussion on India's own narrowly defined interests. There appear considerable doubts and reluctance in India's strategic community as to whether India at all needs venture out beyond transactionalism in its approach to foreign policy at all, given its limited capacity in terms of hard power. Such sober reflection on the country's capability risks being misconstrued in the region and beyond as indifference. For all its increasing

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<sup>45</sup> Chatterjee, Kingshuk, "India could play a role in ending the Israel-Iran conflict," *Awaz*, 20 June 2025. <https://www.awazthevoice.in/opinion-news/india-could-play-a-role-in-ending-the-israel-iran-conflict-38347.html>.

<sup>46</sup> "India – Middle East – Europe Economic Corridor: Connectivity in an Era of Geopolitical Uncertainty", Atlantic Council, <https://www.atlanticcouncil.org/wp-content/uploads/2025/08/The-India-Middle-East-Europe-Economic-Corridor-Connectivity-in-an-era-of-geopolitical-uncertainty.pdf>



engagement with countries in the region individually, therefore, India is yet to develop a policy that either sees the Middle East as a region, or goes beyond a limited kind of transactionalism.

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