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Russia and India: A New Chapter

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Summary

Russian-Indian relations are undergoing a major change.

Throughout the Cold War, the relationship rested on three pillars:

- Soviet arms sales to India;
- shared public-sector-heavy economic philosophy and extensive Soviet aid; and
- the Soviet Union–India vs. United States–Pakistan–China geopolitical alignment.

The fall of the Soviet Union, the rise of India and China, the U.S.-China tensions, the deepening of U.S.-India ties, and the Russian-Chinese partnership intensified by Russia's break with the West and the war against Ukraine have had a profound effect on Russian-Indian relations.

Of the three pillars of the Moscow–New Delhi relationship, only one remains: the arms trade. Russia remains a major supplier of weapons to India, and Russian equipment still makes up a vast portion of Indian Armed Forces' force structure; but Russia is facing competition in the Indian arms market. India's desire to diversify its supply of weapons and develop its own defense industry has resulted in declining Russian arms deliveries to India in recent years.

Russia's break with the West because of its war against Ukraine has accelerated its pivot toward China. Against the backdrop of U.S.-China and China-India tensions, Russia's position as China's junior partner will make it harder for Russia to preserve partnership with India. Moscow's leverage versus both New Delhi and Beijing is shrinking as they have greater capabilities of their own than they had previously and have new partners that offer more than Russia.

Still, the Russian-Indian partnership will continue. For India, Russia remains an important supplier of weapons and, most recently, oil. India has not joined the West's sanctions on Russia. By doing so, it has demonstrated its independent foreign policy. For Russia, India is an important market for arms and oil. The Indian-U.S. security relationship is relatively new, whereas India-Russia ties have endured for over two generations. India has no reason to forsake the benefits of this relationship. Nor does Russia.

It has been said that Moscow plays a weak hand well, but sustaining strong security ties with both China and India will become more difficult for it. The question is how China will react to Russian arms sales to India, and what Russia will do if pressed by China to curtail them. For reasons of geographic proximity, economic ties, and personal relations between Presidents Vladimir Putin and Xi Jinping, the odds favor Beijing over New Delhi to have a bigger say in Moscow.

Introduction

The encounter between President Vladimir Putin and Prime Minister Narendra Modi at the September 2022 summit of the Shanghai Cooperation Organization (SCO) in Samarkand, Uzbekistan, captured the change that is occurring in the partnership between Russia and India. Speaking about the Kremlin's invasion of Ukraine, Modi, in what amounted to a public admonition, told Putin that he had spoken to him “many times before” about the need to rely on diplomacy and take the path toward peace to wind up a war that had caused food and fuel prices to soar.¹ Xi Jinping, who also attended the SCO gathering, did not endorse Putin's war, but neither did he overtly criticize it; Modi did. India, while it has long depended on Russia and still regards it as an important country, increasingly seeks to set the terms of their engagement.

Russia and India have enjoyed a long history of friendly, mutually beneficial relations. Throughout the Cold War, the Soviet Union as a superpower had the upper hand in the relationship with India, which was part of the community of “developing” nations, albeit also one of the leaders of the Non-Aligned Movement. The breakup of the Soviet Union and Russia's subsequent diminished international status shifted the balance in the relationship toward India, which had emerged as a major power transformed by the economic reforms initiated in the early 1990s and as well as a growing global presence. In the continuing friendly and extensive ties between Moscow and New Delhi, no observer would describe the latter as the junior partner.

In the aftermath of Russia's invasion of Ukraine on February 24, 2022, this relationship is poised to undergo an even greater transformation for four reasons:

- Russia's pursuit of ever-closer ties with China.
- The greater importance for Russia of its ties with China than with India.
- Russia's diminished importance for India's foreign policy agenda.
- India's growing security relationship with the United States.

This paper first provides the strategic context surrounding the Russian-Indian relationship and its evolution from the end of the Cold War to the start of the February invasion of Ukraine. It then provides an analytical overview of the relationship, including the legacy of the Soviet era, the period since the breakup of the Soviet Union, and the post-invasion dynamics. Finally, it offers two scenarios for the course the relationship could take and concludes with the implications for U.S. interests.

The Strategic Context

The consequences of Russia's war against Ukraine will be felt for decades. In Europe—the epicenter of the conflict between Russia and the West—the war has shattered the remnants of the post–Cold War security landscape, triggered a historic break between Russia and the rest of the continent, and prompted the North Atlantic Treaty Organization (NATO) to fundamentally reassess its security posture.²

This shift follows a long series of milestones in the three decades since the end of the Cold War, during which Russia's relations with the West steadily deteriorated. The key ones leading up to the full invasion of Ukraine were Russia's opposition to the enlargement of NATO to former Soviet satellites, its disagreement with the United States' overthrow of Saddam Hussein's regime in Iraq, the 2008 Russian-Georgian war, and the annexation of Crimea and the start of the undeclared war in eastern Ukraine in 2014. In other words, an adversarial relationship with the West has been a hallmark of Russian foreign policy under Vladimir Putin's leadership virtually the entire time.

Putin's foreign policy has also been guided by two other objectives: a deepening partnership with China, recently described by him and China's President Xi Jinping as a “no limits” friendship, and the promotion of a multipolar world in which a coalition of other major powers, with Russia at the helm, would contain the influence of the United States and its Western allies.³ This concept was first articulated in Russian foreign policy doctrine in the 1990s by then foreign minister Yevgeny Primakov.⁴ This strategy envisions a concert of major powers that includes India and China.



Meeting between Russian President Vladimir Putin and former foreign minister Yevgeny Primakov. Primakov conceptualized a multipolar world with Russia leading a coalition of major powers. Photo by Sasha Mordovets/Getty Images.

In retrospect, it is easy to understand the logic of a project to oppose what Russia regarded as the global hegemony of the United States. Primakov intended to build on the traditions of post–Second World War Soviet foreign policy in which he was schooled, in spite of Russia's military and economic weaknesses during the 1990s. Neither China, with which the Soviet Union had reconciled late in Mikhail Gorbachev's term, nor India, with which it had enjoyed close and warm relations since the mid-1950s, had yet achieved the global stature they now enjoy. It must have been difficult for a Soviet-era apparatchik like Primakov to imagine

that both, long perceived by the Soviets as backward, “developing,” countries would emerge as global powers equaling, and even surpassing, Russia in their capabilities, influence, and wealth. Hence the idea of Russian leadership in the club of three major Eurasian powers that, according to Primakov’s logic, would not bow to U.S. hegemonic ambitions and instead help Russia contain them. That concept also fit well with Putin’s anti-U.S., anti-Western strategy.

For most of Putin’s tenure, managing the dynamics within the Russia-China-India triangle has been a relatively easy task that required little diplomatic finesse. The relationship with China, which had been gradually improving since the late 1980s, accelerated after Putin’s return to the presidency in 2012. His visit to Beijing following his refusal to join the G8 leaders at Camp David just a few weeks earlier was emblematic of his commitment to develop closer ties with China.⁵

The partnership with China grew even closer with Xi’s accession to the presidency in 2013 and the forming of a personal bond between the two leaders. Russia’s annexation of Crimea in 2014 and the resulting downturn in its relationship with the West propelled it toward an even closer embrace of China. The expansion of economic ties included the construction of the Power of Siberia pipeline—and the 2022 agreement for a second such pipeline—to carry natural gas from Siberia to China as well as increased Russian arms exports.⁶

The partnership between Moscow and Beijing has been reinforced by their increasingly adversarial relationships with Washington. While U.S.-Russian relations deteriorated, U.S.-Chinese ties became increasingly tense as Beijing’s ambitions expanded along with its capabilities, and also as Barack Obama’s administration “pivoted” to the Asia-Pacific and pledged to increase the U.S. military presence there to reassure allies and partners, with the clear aim of containing China’s growing influence and ambitions.⁷

Russia’s relationship with India has followed a different course. India has not received the same degree of top-level attention as China, for several reasons. At the top of the list are geography and geopolitics. For Russia, with its long border with China and adversarial relations with the West, avoiding a two-front confrontation is an imperative. Otherwise, it would risk making the same mistake the Soviet Union made during the Cold War. For decades, the Kremlin had effectively pursued two Cold Wars at once—with the United States and with China. Normalizing relations with China in the late 1980s and 1990s was therefore of paramount importance. Moreover, whereas Russia’s pursuit of ever-closer ties with China has been fueled by shared geopolitical rivalry with the United States, relations with India have lacked a similar motivation. Rather, Moscow’s approach to New Delhi has been driven by the sunk costs of their long-standing close ties: there was no reason for Russia to abandon the presence and influence in India that it had built up over six decades. Nor did Russia’s post-Cold War diminished circumstances position it to greatly increase its influence in

India. Meanwhile, as India's economic strength increased, its ambitions geopolitical horizons expanded, and its partnership with the United States progressed, the position of Russia as a strategic and economic partner declined relative to the Cold War era.⁸

Notwithstanding several periods of attempted detente in India's relationship with China, it has long been tense, notably because of the legacy of the 1962 war, in which the former lost significant territory to the latter, and the border clashes that have occurred since then.⁹ The two countries also see themselves as strategic competitors in Asia and make moves and countermoves accordingly. While India has not joined any formal alliances in response to the rapid increase in China's economic and military power, and has maintained its tradition of nonalignment, it has also forged a "strategic partnership" with the United States and become—alongside Australia, Japan, and the United States—a member of the Quad, an informal grouping that since its establishment in 2007 has evolved into a closer partnership, reflecting these countries' wariness of and determination to counter China's expanding ambitions.¹⁰

For Russia, the task of managing its relationships with China and India simultaneously might have seemed complicated at first, but in reality, that has not been true for most of Putin's tenure at the helm. Early on in Putin's presidency, it became clear that Primakov's vision of a concert of great Eurasian powers with Russia at the helm was unrealistic. For China and India, relations with Russia, while important, clearly took a back seat to other priorities. For Beijing, those priorities include relations with the United States and developments in the western Pacific, as well as its Belt and Road Initiative. Russia can play a useful supporting role in the first, but is of little consequence in the second and third.¹¹ For New Delhi, those priorities are expanding its international footprint and managing relations with China, which also includes its partnership with the United States. Russia is likely to be of some help in the former (it supports India's aspirations to become a permanent member of the UN Security Council) but its role with respect to the latter is ambiguous because of its increasingly close ties to China and continuing role as a major supplier of arms to India.¹²

Beijing and New Delhi have paid lip service to Moscow's aspirations for leadership in the Shanghai Cooperation Organization and the BRICS (Brazil, Russia, India, China, and South Africa) grouping but not much more than that. Russia apparently hoped to assert its global leadership by using both forums for countering U.S. influence, but neither has become a major venue that could help it advance its initiatives and project influence.¹³

Russia's task of managing the dynamics within this triangle is likely to become considerably more complicated. By shattering its relationship with the West, Russia's aggression against Ukraine has greatly reduced its space for geopolitical maneuver and pushed it closer than ever before to China, while also reducing its leverage with Beijing. The "no limits" embrace of China has become the

strategic imperative. Russia's prioritization of China in foreign policy against the backdrop of deteriorating relations between China and India as well as of the latter's expanding range of partnerships raises the prospect of a major shift in Russian-Indian relations, perhaps even to the point of winding down their decades-old strategic partnership.

The Cold War Foundation

For most of the Cold War, the Soviet Union and India enjoyed warm relations, and at times were even closely aligned. India's leaders and intellectuals believed that the USSR offered lessons for their country, which was determined to industrialize rapidly while combining growth with a reduction in poverty and stark economic inequalities. Moreover, ex-colonial countries like India did not regard the Soviet Union as an imperial power of which they ought to be leery.

The Soviet view of India—and of other colonies that gained independence in the first decade of the Cold War—was initially not so charitable. So extensive were the ties—economic, cultural, and institutional—between ex-colonies and their former rulers that Soviet leaders and ideologists did not regard them as authentically independent. As Soviet Marxist jargon had it, they were ruled by a “comprador bourgeois” class economically, and therefore politically beholden to former colonial overlords. Meanwhile, India, as one of the leading lights in the Non-Aligned Movement, was determined to stay clear of Cold War rivalries and to play a neutral international role. In the early postcolonial years that coincided with the beginning of the Cold War, Moscow dismissed such aspirations and even directed the pro-Soviet Communist Party of India to pursue the path of revolution against the country's “bourgeois nationalist” governments.¹⁴

Following Stalin's death in 1953, this rigid Soviet ideological line changed, but India's opposition to alliances proved lasting. U.S. Cold War strategy called for building alliances to contain the Soviet Union. India's prime antagonist, Pakistan, joined the Central Treaty Organization (CENTO, also known as the Baghdad Pact) and Southeast Asia Treaty Organization (SEATO). India, by contrast,



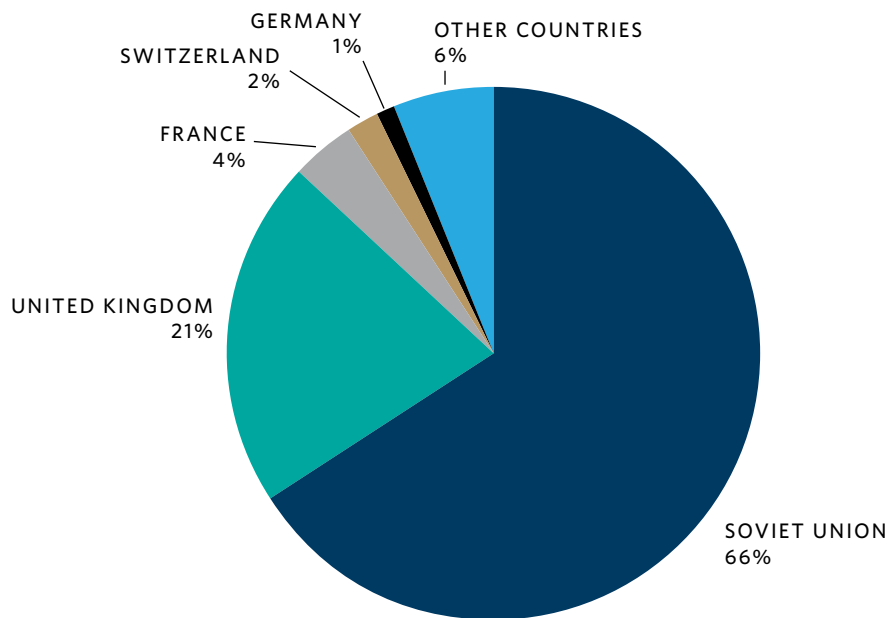
Meeting between then Communist Party general secretary Nikita Khrushchev and Indian prime minister Jawaharlal Nehru in 1961, part of a long history of deep relations between the Soviet Union and India. Photo by Keystone-France/ Gamma-Rapho via Getty Images.

was a critic of U.S. containment and did not join any alliances. In November 1955, then Communist Party general secretary Nikita Khrushchev and prime minister Nikolai Bulganin became the first Soviet leaders to visit India. Before long, the three pillars of the Soviet-India relationship were in place. They would endure throughout the Cold War, solidified in large measure by the configuration of international politics from the mid-1950s to the late 1980s.

First, the Soviet Union soon became, and remained until its collapse in 1991, India's prime arms supplier, supplanting Britain, which New Delhi had looked to in the early years of its independence. Soviet arms were critically important to India because Pakistan was receiving U.S. arms and, from the 1960s, Chinese ones as well. As Figure 1 shows, the Soviet Union dominated the Indian arms market during the Cold War.

Soviet-designed tanks and aircraft were also manufactured in India under license. As one of India's leading strategic thinkers, K. Subrahmanyam, noted in 2005: "After 1964 . . . Moscow became almost the sole source of arms for India for all three services."¹⁵ Even today, some 85 percent of the country's force structure is of Soviet provenance, creating a decades-long dependency for spare parts and improved models of armor, missiles, and aircraft.¹⁶ In addition, many Indian military officers received training in the Soviet Union.¹⁷

FIGURE 1
Indian Arms Imports by Country, 1955-1991

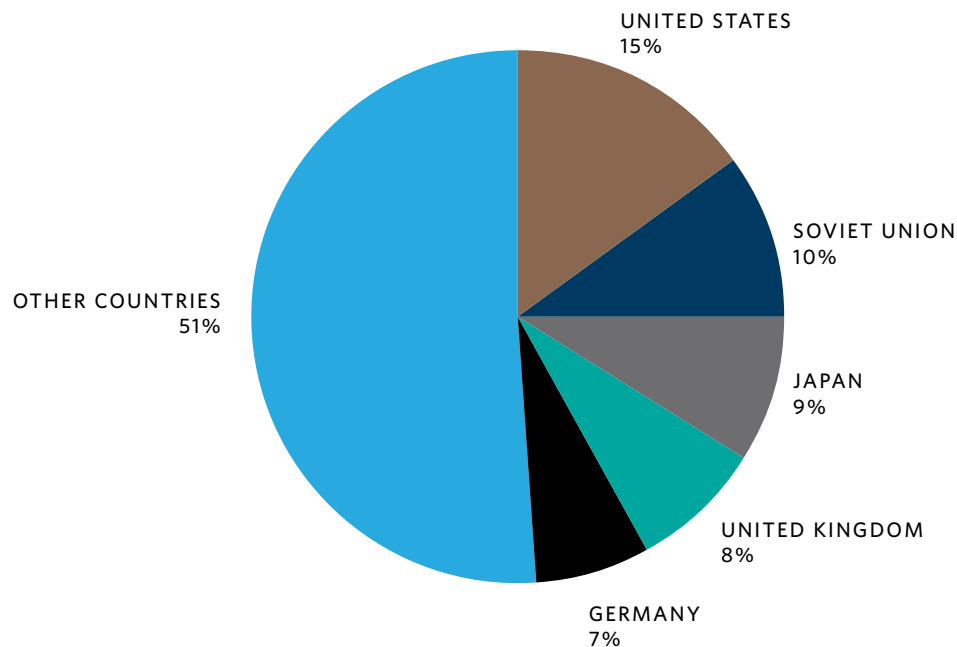


SOURCE: SIPRI Arms Transfer Database, accessed July 23, 2022.

Second, the Soviet Union played a substantial role through aid and technical assistance in building the public sector of India's economy, notably in steel making, power generation, and heavy industry.¹⁸ The United States, which championed private enterprise, was far less enthusiastic about fostering the state-run sector of India's economy. Moreover, India's protectionist policy and restrictions on foreign investment during most of the Cold War constrained its economic ties with the West and resulted in expanded commercial opportunities for the Soviet Union. Even so, as Figure 2 demonstrates, trade was then hardly the strongest pillar of the relationship, especially when compared to the arms trade.

Third, the alignment of the United States, Pakistan, and China made for convergent strategic interests between the Soviet Union and India.¹⁹ Notwithstanding the ups and downs and Moscow's flirtations with Pakistan,²⁰ following the Sino-Soviet split in the early 1960s, the Soviet Union and India were brought closer together by what both saw as a shared threat from Beijing.²¹ The Soviet Union's support for India in its war with Pakistan in December 1971 and their Treaty of Peace, Friendship and Cooperation signed earlier that year were important manifestations of the two countries' close ties.²² The geopolitical fault lines became even more evident when China, Pakistan, and the United States opposed the Soviet Union's invasion of Afghanistan in 1979—India not only refused to condemn it and even expressed qualified support—and supported the Afghan resistance, which ultimately led to the Soviet withdrawal a decade later.²³

FIGURE 2
India's Total Trade by Country, 1960–1991



SOURCE: IMF Direction of Trade Statistics, accessed on August 16, 2022.

After the Cold War: A New Dynamic

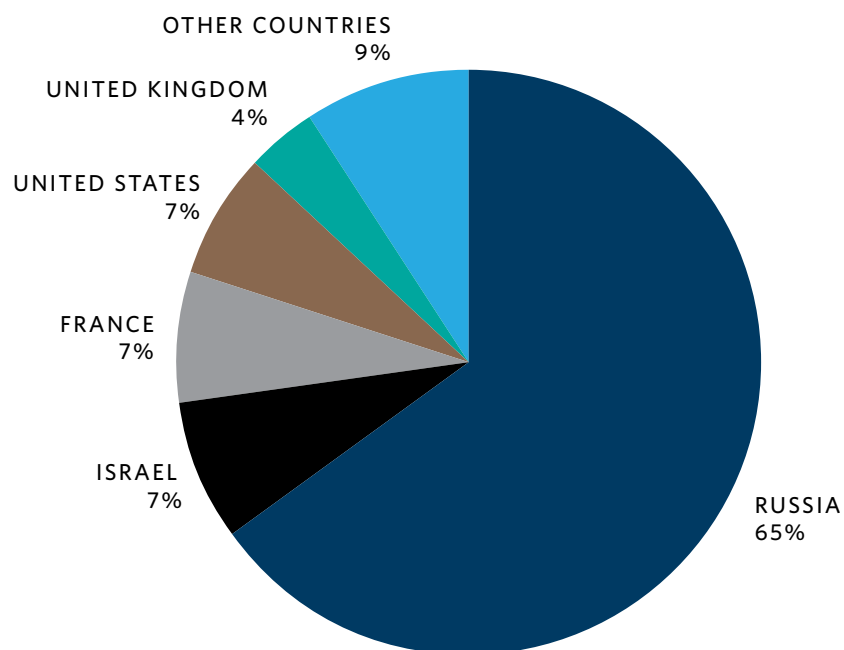
The end of the Cold War proved highly consequential for the pillars of the relationship between Moscow and New Delhi—arms sales, economic and technical aid, and the geopolitical dynamics between China, India, Pakistan, Russia, and the United States. Russia emerged from the Cold War as a much less important, albeit still valued, partner for India with respect to all three of these fundamentals.

Arms Sales—Ties That Endure

Arms sales continued to be the most important element of Russian-Indian relations in the post-Cold War years. As Figure 3 demonstrates, Russia has supplied two-thirds of India's total arms purchases since the Cold War ended.

Russia benefits from the large share of Soviet and Russian legacy systems in the Indian arsenal. The overwhelming majority of India's armored force consists of Soviet/Russian tanks—the T-72 and T-90S—and so does its fleet of ground-attack aircraft—variants of MiG-21, Su-30, and MiG-29.²⁴ Over half of India's conventional submarines are of Soviet design. So are all of its aerial refueling tankers (Il-78s) as well as its only aircraft carrier and nuclear-powered submarine.²⁵

FIGURE 3
Indian Arms Imports by Country, 1992-2021

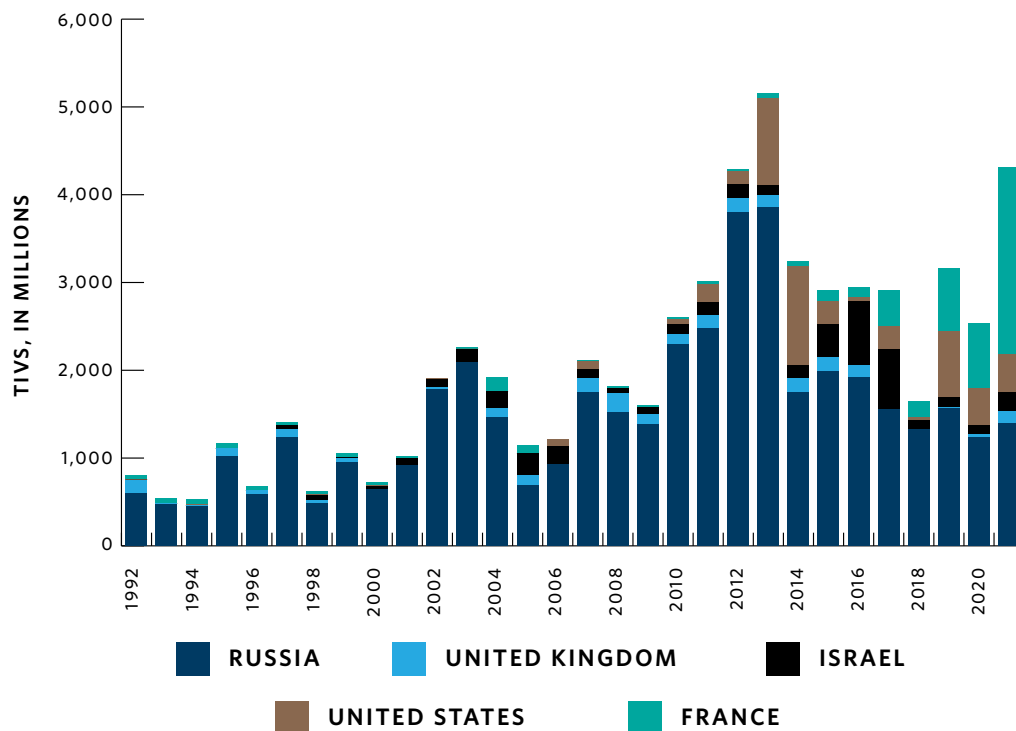


SOURCE: SIPRI Arms Transfer Database, accessed July 27, 2022.

Russian weapons have tended to be less expensive while remaining more or less competitive with Western equivalents, and available on more flexible payment terms.²⁶ Russia is also willing to transfer technology and license weapons production in India—an attractive option for New Delhi. Between 2000 and 2021, the two countries signed more than fifty separate deals for main battle tanks, infantry fighting vehicles, fighter jets, anti-ship and surface-to-surface missiles, multiple rocket launchers, anti-tank missiles, frigates, and anti-submarine warfare aircraft.²⁷ Of these agreements, fourteen were signed after Russia’s 2014 intervention in Ukraine, including the \$5.2 billion agreement in 2016 to sell India the S-400 air defense system.

Thus, Russia is poised to remain a major arms supplier to India for a long time, and India is not about to give up on it as a supplier. Its multiple weapons deals with Russia were signed despite the risk of U.S. sanctions under the 2017 Countering America’s Adversaries Through Sanctions Act, which is designed to punish Russia for the 2014 annexation of Crimea and its undeclared war in eastern Ukraine.²⁸ However, as other countries—such as France, Israel, and the United States—enter the Indian arms market, and as India seeks to diversify its suppliers, Russia will face increasing competition.²⁹ Since the peak of 2013, its arms exports to the country have declined by more than 50 percent (see Figure 4).

FIGURE 4
Indian Arms Imports From Top 5 Suppliers, 1992-2021



SOURCE: SIPRI Arms Transfer Database, accessed July 27, 2022.

NOTE: TIVs, or trend indicator values, are based on the known unit production costs of a core set of weapons. SIPRI intends to capture all military resources rather than a transfer’s financial value.

Still, both countries appear committed to continue their arms trade relationship as long as it serves their respective interests. For Russia, this remains the most important Soviet legacy tool to secure its presence in India and to seek and retain influence there. By no means, then, are Russian arms about to become marginal for India: the legacy effect of past purchases remains strong as does India's belief that Russia has long been a valued, reliable source of weaponry. As recently as 2020, during a Sino-Indian confrontation along the border, India's defense minister discussed the supply of military equipment and spare parts during a visit to Moscow.³⁰

Economic Relations: Russia Matters Much Less

Trade and economic ties, never the most robust of the three pillars of the relationship during the Cold War, have declined significantly. This is due to Russia's economic troubles, notably in the 1990s, which made it a much less attractive country to emulate, and to the radical change in India's economic philosophy.

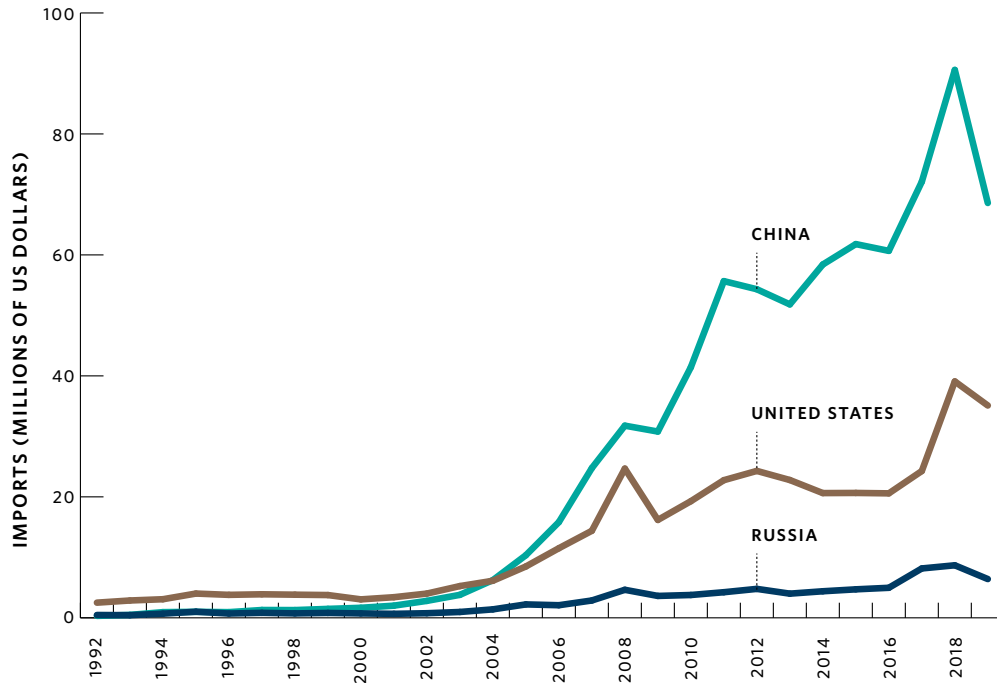
The shift in India from the emphasis on public-sector-driven economic development and on import substitution to a more market-driven model, lower tariffs, and greater openness to foreign investment has also reduced Russia's economic significance for the country.³¹ Whereas the Soviet Union was regarded by Indian leaders as a country whose economic model offered valuable lessons, Russia today offers little by way of positive experience; if anything, it provides a lesson about what not to do. As Figures 5 and 6 demonstrate, Russia has been of marginal importance at best to India as a trading partner.

Other than as a source of commodities, Russia has little to offer India as a trading partner. In 2020, Russian exports to India—other than weaponry—amounted to less than \$6 billion and Indian exports to Russia to less than \$3 billion.³² Coal briquettes were at the top of list of Russian exports to India, valued at \$923 million, while packaged medicaments were the largest Indian exports to Russia, valued at \$444 million. For comparison, in 2020 Russia's two-way trade with China was just over \$100 billion while U.S. two-way trade with India in 2020 was \$120 billion.³³

With \$1.26 billion in total Russian investment in India from 2000 to 2021, Russia's footprint in the Indian economy is small.³⁴ The United States is the largest source of foreign direct investment in India with an estimated \$42 billion.³⁵ The declared goal of the Russian and Indian governments to increase two-way investment to \$50 billion by 2025 is certain not to be realized.³⁶

FIGURE 5

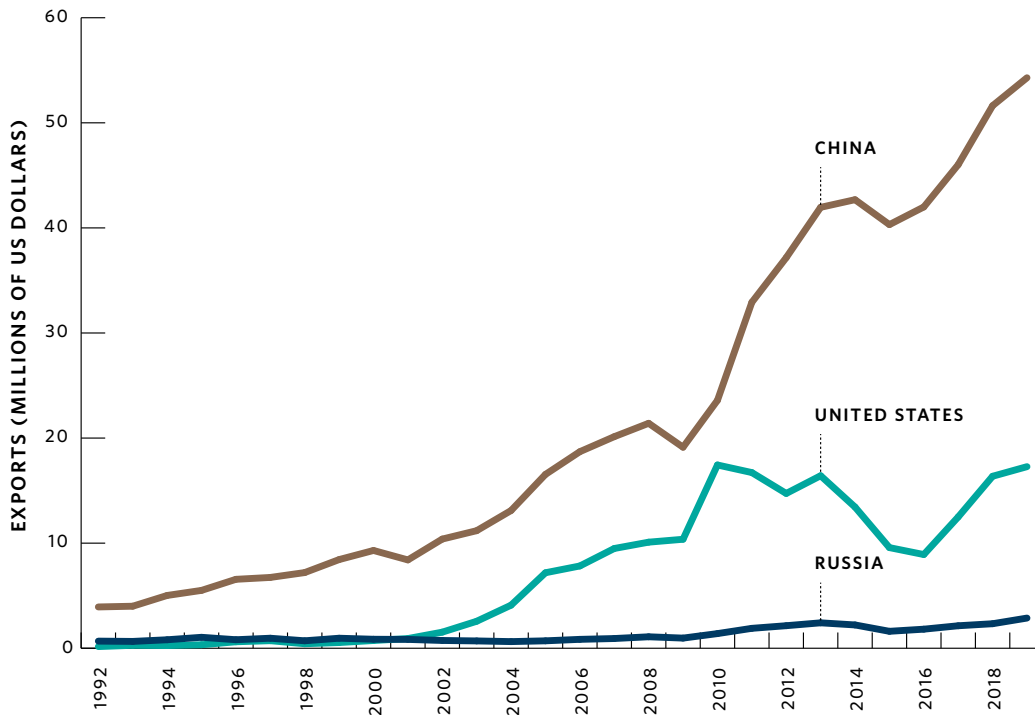
Indian Imports From Russia, China, and the United States, 1992-2019



SOURCE: World Integrated Trade Solution database, World Bank.

FIGURE 6

Indian Exports to Russia, China, and the United States, 1992-2019



SOURCE: World Integrated Trade Solution database, World Bank, accessed on July 26, 2022.

Thus, in trade and investment Russia's importance to India is marginal, and there is no evidence to suggest that this will change.

The one area where their trade has increased significantly since the invasion of Ukraine is oil. India ranks third in oil consumption in the world and imports nearly 85 percent of its needs, a figure that is projected by the International Energy Agency to reach 90 percent by 2040.³⁷ The West's economic sanctions imposed on Russia in retaliation for its aggression against Ukraine, which include attempts to limit its oil exports and revenues, have been a boon to India. New Delhi has not joined the sanctions regime. Instead, taking advantage of discounts on Russian oil, it has stepped up its purchases dramatically—from less than 50,000 barrels per day in 2021 to nearly 1 million barrels per day, or just under 20 percent of projected total oil imports, in June 2022.³⁸ Major Indian purchases of Russian oil are projected to continue as long as it remains economically attractive.³⁹

However, this aspect of economic relations only underscores the reversal of fortunes between the two countries. Outside India's defense sector, where it faces competition from other entrants, Russia no longer has the upper hand in the relationship and has become principally a supplier of raw materials to a country that it once considered its client.

The New Geopolitics Shaping Russian-Indian Relations

The combination of the end of the Cold War, the dynamics in South Asia, and the great-power realignment has resulted in a major shift in the relationship between India and Russia. That shift is still ongoing and almost certain to be further fueled by the war in Ukraine.

Russia's role in this realignment was almost entirely passive and marginal. Its own domestic upheavals after the end of the Cold War and retreat from the world stage to deal with them diminished its significance as a counterbalance to Pakistan in India's eyes. But arguably, the most important driver of change was the political and economic dynamics in India. The country's economic liberalization against the backdrop of similar trends worldwide has been accompanied by the expansion of economic and political ties with the United States. Then president Bill Clinton's visit to India in 2000 was a major milestone in U.S.-Indian relations, which have developed further since then.⁴⁰

In a parallel development, U.S.-Pakistani ties soured after the withdrawal of the Soviet Union from Afghanistan in 1989. U.S. frustrations over Islamabad's pursuit of nuclear weapons, combined with Pakistan's backsliding on democracy and warming U.S.-Indian relations were unmistakable signs of a changing trilateral dynamic.⁴¹ The terrorist attacks of September 11, 2001, and the realities of the war in Afghanistan left the United States no choice but to patch up its relationship with Pakistan. Even so, Islamabad's dual role throughout the war as a U.S. partner and as the Taliban's sponsor was an obstacle to better ties with Washington.

The U.S.-Indian rapprochement has occurred against the backdrop of three other developments: the burgeoning Russian-Chinese partnership, growing U.S.-Chinese tensions, and steadily improving Pakistani-Chinese relations. As a result, the geopolitical dynamics in and around South Asia have been transformed. Whereas during most of the Cold War the compact between China, Pakistan, and the United States was juxtaposed with the quasi-partnership between India and the Soviet Union, in the new configuration India and the United States are aligning against China and Pakistan.

While India and Russia maintain cordial relations, their geopolitical priorities have evolved. Partnership with the United States has grown in importance for India, whereas Russia has drawn ever closer to China. Unlike with the United States, India has neither common adversaries nor common partners with Russia. In other words, their geopolitical ties are loosening. The further Russia's military and security ties with China grow, the more incentives there will be for India to deepen its relationship in these realms with the United States, though it is unlikely to do so at the expense of its ties with Russia which extend beyond arms trade to a larger, multifaceted relationship. India most likely will be determined to preserve it. As recently as December 2021, during Putin's visit to India, the two countries restated a commitment to their "special and privileged strategic partnership."⁴²

In a telling example of India's nuanced posture toward Russia, it has agreed to join the Russian-hosted military exercise Vostok '22 in August-September 2022, alongside China. The exercise reportedly involves 50,000 troops, more than 140 aircraft and 60 warships.⁴³ However, India sent only 75 personnel to take part in it. Moreover, no Indian Navy vessels have been dispatched to the naval part of the exercise reportedly because of concerns about damaging relations with Japan.⁴⁴

A Closer Look at Russia and Pakistan

In recent years, Russia has pursued an improved relationship with Pakistan. This may be a signal to New Delhi, a move reminiscent of the 1960s. It could also be explained as a response to the long-awaited U.S. withdrawal from Afghanistan and to Pakistan's importance to the trajectory of that country. In other words, rapprochement with Islamabad could be Moscow's hedge against the spillover of instability from post-U.S. Afghanistan to Central Asia.

The signs of this new Russian policy have been unmistakable.⁴⁵ In 2015, Russia concluded a major deal to sell Pakistan transport and attack helicopters.⁴⁶ Since then, there have been discussions about deals to sell Pakistan main battle tanks and air defense systems.⁴⁷ One key question facing Russia is how far it is prepared to go given the risk these arms sales pose to its relationship with India.⁴⁸ The possibility of selling the S-400 air defense system to Pakistan (whose military is interested in obtaining it), which India has already purchased, is one example.⁴⁹ In 2015, Moscow signed a defense cooperation agreement with Islamabad, following a visit by Defense Minister Sergei Shoigu the previous year.⁵⁰ In 2016, the two countries initiated annual military exercises, the latest of which, Druzhba-VI, were held in September and October 2021 in the Krasnodar region in southern Russia.⁵¹

In April 2021, Foreign Minister Sergey Lavrov visited Pakistan—a first after a nine-year interval. The visit was clearly arranged in anticipation of the U.S. withdrawal from Afghanistan. Russia has convened several meetings focused on Afghanistan in the Moscow Format, which has included China, India, Iran, Pakistan, and the Central Asian states.⁵² However, in a remarkable snub to India, it was excluded from the meetings attended by China, Pakistan, Russia, and the United States.⁵³ More recently, in a symbolic move, Pakistan's then prime minister Imran Khan visited Moscow and met with Putin on February 24, 2022, as Russia launched its invasion of Ukraine.⁵⁴

These developments suggest that Russia is trying to respond to New Delhi's closer security ties with Washington by adjusting its long-standing India-centered South Asia policy, though without abandoning its ties with India, whose global strategic heft exceeds that of Pakistan. However, beyond the arms trade and apparently modest joint exercises, there is little that Russia can offer Pakistan to meet its larger needs in economic development, investment, or dealing with the consequences of climate change and frequent environmental disasters.⁵⁵

In sum, Russian-Indian relations have undergone a rebalancing. That was to be expected, considering the radically changed circumstances of both countries and their geopolitical priorities. The balance in the relationship has shifted decidedly in India's favor. That owes to its record of economic development and emergence as a great power with growing ambitions. But it also reflects the challenges India faces as a result of the even more impressive growth in China's economic and military power, and the consequent increase in its global influence and status. The question is where Russia fits in this new dynamic given its commitment to the "no limits" partnership with China and simultaneous intent to protect its multidecade investment in its relationship with India. That is equally for Moscow and New Delhi to answer, as the latter has also invested a great deal in the relationship.

What Next in Russian-Indian Relations?

The rebalancing of Russian-Indian relations cannot be said to have reached a new status quo, and they will likely undergo significant changes in the years to come. These likely will result from the erosion of the pillars on which the relationship has rested for decades—arms trade, economic ties, and congruent geopolitical interests. Russia, long the preeminent supplier of arms to India's military, is already facing competition in this marketplace, not least because of India's commitment to diversifying its sources of supply and other exporters' hunger for lucrative arms deals. Russian arms manufacturers will have to compete with technologically more advanced suppliers such as France, Israel, and the United States as well as with India's own defense industry—all the while remaining under tough Western sanctions. Despite the increase in India's purchases of Russian oil since the invasion of Ukraine and the imposition of Western sanctions on Russia, the commercial relationship between the two countries, already a small fraction of their overall foreign trade, is still marginal to both and virtually certain to remain so.

The geopolitical pillar of Russian-Indian relations is also poised to be weakened by forces beyond Moscow's control. The breakdown in relations with the United States has propelled Russia to seek ever-closer ties with China at the same time as the rivalry between India and China has intensified. Maintaining parallel partnerships with Beijing and New Delhi is likely to prove a difficult challenge for Russian diplomacy, especially in the event of increasing tensions, let alone conflicts, between India and China. If there are more clashes along the Sino-Indian border in the years to come, not to mention a full-scale war, it may become too difficult to manage at all.

Russia is becoming a marginal player in this triangular dynamic for reasons ranging from the size of and prospects for its economy to poor innovation record and outlook to demographics. While their respective relationships with Moscow will remain important for Beijing and New Delhi, they will

also be of declining value to both. Russia will find that being a junior partner to China while managing a legacy relationship with India reduces its room for tactical and strategic maneuver. Absent a major improvement in its own strategic position, which appears unlikely as long as it follows the foreign and domestic policy path cut by Putin, Russia could face a difficult choice between its “no limits” friend, China, and its oldest and most valuable Asian partner, India.

The dynamics within this triangle will likely follow one of the two following scenarios, with similar outcomes albeit on different timelines.

China’s “Vassal”

In this scenario, having burned its bridges to the West, Russia will become ever more dependent on China.⁵⁶ This will occur against the backdrop of China’s growing power and increasing tensions with India, including recurrent clashes along their border; of growing Chinese influence along India’s periphery (in Bhutan, Nepal, Pakistan, Sri Lanka, and Central Asia); and of increasing apprehension in New Delhi about what it regards as a Chinese version of containment. This in turn will deepen India’s strategic alignment—though it falls short of an alliance—with the United States and lead to Russia being all but supplanted in the Indian arms market by the United States and its European allies.

With Russia’s importance to India as an economic partner in long-term decline, Moscow will become hard-pressed to compensate for these developments and offer New Delhi what it values on other fronts, such as favorable trade deals—especially regarding oil—and more advanced defense hardware and technologies. But oil discounts work only when prices are high, and the imperative of protecting its strategic alignment with Beijing will limit Moscow’s ability to deepen defense-industrial ties with India. China may even insist at one point that Russia significantly curtail or even end its arms sales to India.⁵⁷ Should this scenario materialize, the decades-old partnership between Moscow and New Delhi, forged during the Cold War, would become much less special.

A Difficult Balancing Act

This scenario also presumes that Russia’s dependence on China will grow. However, here China and India will manage their relations so as to avoid further escalation of tensions, enabling Russia to continue its policy toward India since the end of the Cold War. Moscow will do so by relying on familiar tools: sales of more advanced weapons systems, especially on favorable financing terms; long-term energy deals at discounted prices, building on the increase in oil deliveries following Western sanctions and boycotts; and a steadfast refusal to take sides on the issues that divide China and India.

However, the success of this strategy will be far from guaranteed for several reasons. It is not clear how much more military hardware Russia can sell in the more competitive Indian market. Oil is a useful instrument of statecraft but only when prices are high, which is not guaranteed due to the combination of energy transition and fluctuations in global supply and demand. Increasingly Russia will find that India, whose economic ties with the West and the Asia-Pacific will become even stronger, dictates the terms of their relationship.

Still, facing an increasingly hostile and powerful China, India will not want to abandon its long-standing security relationship with Russia and will work hard to preserve it, in part because of a lack of confidence that the United States can be counted upon a reliable security partner. For all of its problems, Russia will remain in Indian minds a country that has, albeit for its own interests, stood by India in difficult times. In consequence, Russia will remain in good standing with India's national security apparatus. The relationship will not come under pressure to the degree it will in the first scenario, but neither will it deepen and widen so as to ensure a good foundation the long haul.

Implications for U.S. Policy

Both scenarios will be driven by developments that may be beyond Russia's control—the pace of India's relations with China and with the United States. Russia's leverage will greatly diminish as will its ability to influence those developments. It has been said often that Moscow plays a weak hand well, but the odds of it sustaining strong security ties with China and India simultaneously do not look promising. Modi's public criticism of Putin's war against Ukraine at the September 2022 SCO summit stood in stark contrast to Xi's public silence on the matter.⁵⁸ The difference between the two leaders' public positions is indicative of where Putin is likely to find a more receptive audience and whose words he is likely to heed.

Under these circumstances, the United States is in a good position to develop a multifaceted and durable relationship with India such as it has never had before. This will likely be strengthened and sustained by expanding trade and investment, security ties (arms sales, routine military-to-military contacts, joint exercises, and intelligence sharing), a young generation of Indians connected to the United States by educational and family ties, and an Indian diaspora in the United States that has harnessed its wealth to acquire political influence and is committed to fostering an Indian-U.S. partnership.⁵⁹ In contrast to the Indian-Russian relationship, the one between Washington and New Delhi will fire on many cylinders.

However, by refusing to join the Western sanctions regime, India has demonstrated that it intends to pursue an independent foreign policy guided by its interests. The Indian-U.S. security relationship is relatively new and untested. The United States' Cold War alliance with Pakistan and its rapprochement with China in the 1970s have left a legacy of mistrust among Indian policymakers. By contrast, though it will lose the depth it had during the Cold War, India and Russia have important sunk costs in a relationship that has endured for over two generations and has served them well, including in difficult times. India has no reason to forsake the multiple benefits it has received from a decades-long relationship with Russia, and it would be a mistake to expect that it will do so, no matter the growing tensions between Russia and the West.

Whether Washington's relationship with New Delhi thrives or proves disappointing will depend on the extent to which it benefits both parties rather than on the degree to which the United States succeeds in pushing India away from Russia. The future of the Indian-Russian relationship will have its own logic, determined increasingly by India, and can be shaped at best only at the margins by the United States.

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