



Security Nexus Perspective

WHEN DISTANCE COLLAPSES

IRAN'S CRISIS AND THE GEOGRAPHY OF INDIA'S CONSTRAINTS

By Shyam Tekwani

India's quiet withdrawal from Iran after 2019 was not a diplomatic rupture but an adjustment to constraint. As Iran convulses under sanctions, protest, and regional loss, the distance India sought to create is collapsing. The consequences surface not in rhetoric, but in energy markets, maritime risk, and a western Indo-Pacific long treated as peripheral.

In the summer of 2019, something shifted in the waters between Mumbai and the Persian Gulf. Indian tankers that had traced familiar routes to Iranian ports for decades simply stopped arriving. No announcement marked the change. No policy paper explained the reversal. Under mounting sanctions pressure, New Delhi [halted all oil imports from Iran](#), a partner bound by civilizational ties, strategic calculation, and long habit. Trade did not merely reroute; it thinned before eventually ceasing altogether. A relationship that had once symbolized India's capacity to move independently through competing power centers receded without ceremony.

Seven years later, the distance India sought to create has proved difficult to sustain. [Iran's crisis](#), whether it ends in regime change, coercive survival, or [something less legible](#), reaches India not as distant political upheaval but as pressure on fuel prices, shipping costs, and strategic decisions that resist further deferral. What unfolds inside Iran does not remain contained by borders.

The country now convulses under [overlapping strain](#). Protests have spread across all thirty-one provinces, the most extensive unrest since the [2022 Women, Life, Freedom](#) movement. Inflation has climbed past forty percent, eroding purchasing power as the currency weakens sharply. [Regional influence has thinned](#) following the collapse of allied structures in Syria and beyond. The reimposition of pre-2015 United Nations sanctions in September 2025 restored binding legal constraints, tightening an already narrow space for economic maneuver.

India has responded with silence. That silence is not neutral. It reflects [a set of adjustments already underway](#), made incrementally, absorbed through routine, and rarely acknowledged as such. Iran's crisis does not force new choices upon India so much as it [brings existing ones into focus](#), exposing the limits of ambiguity and a geography of vulnerability long treated as background.

The Alignment India Won't Name

India continues to describe its foreign policy as one of [strategic autonomy](#), an ability to maintain working relationships with the United States, Russia, China, Iran, Israel, and the Gulf simultaneously, without exclusive commitments. What has changed is not the language, but the [environment](#) in which that language is spoken.

Over the past six years, India's relationship with Iran has not collapsed through rupture or reversal. It has thinned through routine decisions, each defensible on its own, each shaped by external constraint rather than declared intent. When Washington withdrew sanction waivers in 2019, [Indian refiners stopped lifting Iranian crude](#). No alternative arrangement followed. The flows ceased.

The same pattern has governed connectivity. [Chabahar Port](#), conceived as a strategic corridor to Afghanistan and Central Asia outside Pakistani transit, has handled [fewer than five hundred vessels](#) over six years. Transactions attached to Iran have grown legally dense and operationally slow, dependent on exemptions that must be renewed rather than structures that endure. When American authorities [sanctioned Indian firms](#) accused of [facilitating Iranian oil sales](#) in early 2025, the effect was not diplomatic protest but commercial withdrawal. Indian companies recalibrated, and engagement narrowed accordingly.

Alongside this contraction, an [alternative system](#) took shape. The India–Middle East–Europe Economic Corridor [bypasses Iran entirely](#), running through the Gulf, Jordan, and Israel toward Europe. Its significance lies less in geography than in compatibility with prevailing financial and regulatory rules. Connectivity now moves where friction is lowest, not where history once pointed.

No doctrine was revised. No alignment was announced. Practice carried the message.

India's Indo-Pacific, Seen from the West

India's Indo-Pacific discourse has remained oriented eastward, shaped largely by concerns over Chinese naval expansion in the South China Sea. That focus carries an implicit assumption: that the country's western approaches are comparatively settled, managed by habit rather than strategy.

Events have begun to erode that assumption. Iran's crisis registers in India through [shipping routes](#), [insurance premiums](#), and fuel prices, through [maritime corridors](#) long treated as background conditions rather than contested space. What comes into view is less a new theater than an old one reconsidered: the [Strait of Hormuz](#) and the Arabian Sea as India's most exposed Indo-Pacific frontage.

The density of dependence here is difficult to ignore. India imports the vast majority of its oil, much of it [transiting Hormuz](#). [The Gulf](#) accounts for a substantial share of India's trade and hosts millions of Indian workers [whose remittances flow](#) directly into household consumption and balance-of-payments stability. Disruption in these waters does not require sustained conflict to impose costs. The mere possibility of interference reshapes risk calculations across energy and shipping markets.

Despite this exposure, India's strategic posture in the western Arabian Sea has remained thin. As engagement with Iran narrowed, so too did the strategic depth that might have accompanied it. Chabahar offered not only connectivity but proximity to the Makran coast—one of the few vantage points near the world's most consequential maritime chokepoint. That access has faded without replacement. Meanwhile, [China consolidated its position at Gwadar](#), and India's own presence west of the subcontinent has been episodic rather than embedded.

How Instability Travels

What complicates India's position in this maritime space is not the absence of capability, but the nature of exposure. [The Strait of Hormuz](#) is not governed primarily by naval balance, but by [risk perception](#). Its stability is priced, insured, and underwritten long before it is contested. Even limited disruption—real or anticipated—travels first through markets rather than through force posture. Insurance premiums adjust faster than fleets can deploy. Shipping schedules reroute before diplomats intervene. Traders hedge before governments signal.

This places states in a reactive position. Presence at sea does not translate cleanly into control over outcomes when the decisive actors are commercial and dispersed. [Deterrence](#), where it exists, is indirect and fragile, operating through expectations rather than enforcement. Escalation need not be sustained to be effective; ambiguity alone can be sufficient to impose cost.

For India, this creates a dilemma distinct from its eastern maritime concerns. In the western Indian Ocean, the tempo of disruption is set less by adversary navies than by [private decisions taken in anticipation of risk](#). The space between stability and crisis narrows quickly, leaving little room for signaling or adjustment once volatility takes hold.

Uncertainty travels ahead of events. [Energy markets respond to risk](#) rather than outcome. Insurance premiums rise. Tanker operators demand higher rates. Shipping firms reroute pre-emptively, adding time and cost. None of these shifts announces itself as crisis. Together, they appear as friction—higher import bills, inflationary pressure, and fiscal strain that accumulates without a single defining moment.

What makes this dynamic corrosive is its duration. A blockade would concentrate attention and invite response. Chronic volatility disperses cost across time. Energy security is taxed continuously. Policy space narrows as governments spend political capital managing exposure rather than shaping outcomes. No single act is required for these pressures to take hold.

Iran's instability does not dissipate at India's coastline. It moves outward across South Asia, carried through energy markets, shipping lanes, [remittance flows](#), and fiscal exposure that bind the region to the Gulf. For economies operating with limited buffers, instability arrives as immediate pressure on prices and currencies. [Pakistan](#) absorbs it through inflation and balance-of-payments stress; [Sri Lanka](#) through import costs and fragile consolidation; [Bangladesh](#) and [Nepal](#) through the vulnerability of Gulf labor markets. [Afghanistan](#) sits at the convergence point, where expulsions and shortages spill quietly across borders.

India absorbs these shocks indirectly but persistently. Volatility elsewhere in South Asia feeds back through prices, supply chains, and diplomatic expectations. The region absorbs western shocks asymmetrically, but continuously.

Constraint Without Exception

Iran's crisis clarifies rather than transforms the structure of power. Strategic autonomy has always rested on the assumption that partnerships could offset pressure, allowing alignment with one major power to be balanced by access to others. [Iran's experience](#) exposes the limits of that logic. Extensive [Chinese investment](#) has not insulated Tehran from contraction. Partnership with Russia has not diluted the reach of sanctions. If [states with greater leverage](#) cannot buffer Iran from external constraint, the protective capacity available to India is necessarily smaller.

When Distance Collapses

Participation in dollar-denominated finance, insurance, and trade [creates dependencies](#) that cannot be selectively suspended. Sustained defiance of sanctions is not a symbolic act; it is an [economic gamble with compounding costs](#). Middle powers do not shape these rules. They navigate among them.

For years, India managed this reality through calibrated ambiguity, an approach sustained by a permissive environment of porous sanctions, pliable markets, and partners willing to look away. Those [conditions have thinned](#). What remains is the vocabulary of autonomy, increasingly detached from the circumstances that once sustained it.

Iran's crisis does not generate India's strategic dilemma. It brings into view pressures that were already present.

When Distance Collapses

Over time, India treated its western maritime approaches as secondary to its eastern Indo-Pacific concerns, even as its most immediate economic dependencies lay to the west. A [strategic relationship with Iran](#) thinned under sanction pressure, not through rupture but attrition. Alternative corridors took shape without securing the waters through which India's energy, trade, and citizens continue to move. Distance was assumed where dependence remained.

The routes once taken by Indian tankers to Iran are unlikely to be reopened. The chokepoints they traversed, however, remain among the most consequential in the global economy. So do the risks that travel through them.

India's Indo-Pacific does not begin where attention has been most comfortably directed. It takes shape where exposure accumulates and distance collapses.

At Hormuz.

And Hormuz does not recede when unobserved.



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