

## Asia



## Indian foreign policy

## Old friends, new plans

## India's Faustian pact with Russia is deepening

EVER SINCE the start of the war in Ukraine, the West has tried to persuade India to distance itself from Russia. India has consistently rebuffed the entreaties. Its officials have pointed out—in often testy exchanges—that the Kremlin has been a stalwart friend for decades. Russia also accounts for about 65% of India's arms imports over the past 20-odd years. Besides, they argued, India needs to nurture the relationship to offset warming ties between Russia and China, India's chief rival.

Western officials and observers concluded that this dynamic would change over time as India increasingly relied on America and its allies for commercial and military partnerships. Their governments decided to strengthen economic ties and provide more advanced defence technology rather than hectoring India. Thus followed deals such as one with America in 2023 to jointly manufacture fighter-jet engines on Indian soil.

India, however, sees its future with Russia very differently, as recent developments make amply clear. First came news that Vladimir Putin, Russia's president, would visit India in early 2025. A few days later, on December 8th, India's defence minister, Rajnath Singh, arrived in Moscow to discuss new defence deals, including the purchase of a \$4bn radar system. That was followed by the two countries' biggest-ever energy agreement, worth roughly \$13bn a year. Rosneft, Russia's state oil company, is to supply some 500,000 barrels per day of crude oil to Reliance, a priv-

ate Indian refiner, for ten years.

India has for the past few years cheerfully bought Russian oil for less than the \$60-per-barrel price cap imposed by Western sanctions, becoming the world's second-biggest buyer of the stuff after China. In 2021 just 2% of India's oil imports came from Russia. Between April and October 2024 nearly 40% did. ICRA, a rating agency, estimates that discounted Russian oil has saved India at least \$13bn since the war in Ukraine began.

Rather than winding down an old cold-war friendship, as Western officials hoped, India is deepening defence, energy and other ties with a partner it sees as a source of prosperity and security and as a linchpin of its "multi-aligned" foreign policy. And it is hoping that this will become less controversial with the return to the White House of Donald Trump. The president-elect was friendly with India during his first term. His pledges to bring peace to Ukraine through negotiation with Russia, if he follows through and meets with success, could also help ease pressure on Russia—and thus India.

This bet could pay off. But the risks are severe. That was demonstrated on January 10th when America escalated sanctions on Russian oil. New measures target producers, insurers and traders, as well as the "dark" fleet of tankers that often carries

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▶ Russian shipments. India (and China) could be forced to buy pricier oil from the Middle East. Indian state refiners are now scrambling to speed payments for Russian crude and to secure delivery of 4.4m barrels currently at sea within a 48-day “wind-down” period allowed by American authorities, according to Bloomberg.

Mr Trump may ease the sanctions but that could take time, to preserve leverage in peace talks with Russia. If talks fail, the war could drag on. And even if they succeed, and sanctions are lifted, the new oil deal is likely to add to India’s substantial trade deficit with Russia (see chart).

Turn next to defence. India has indeed become less reliant on Russian arms, buying from France, Israel and others. Yet the prime minister, Narendra Modi, continues to cut deals with Russia. In July 2024, just before Mr Modi visited Moscow, a Russian state arms manufacturer announced that it would make tank rounds in India. Mr Modi and Mr Putin then agreed to pursue joint weapons development and manufacture. Russian and Indian firms already jointly produce weapons in India, including tanks, fighter jets and missiles.

Mr Singh, the Indian defence minister, added substance on his own Moscow visit by discussing the purchase of Russia’s Voronezh radar system. It can identify and track a range of threats, including ballistic missiles and aircraft, over distances of up to 8,000km (5,000 miles). That would greatly enhance India’s capabilities, giving it coverage far into China, a range accessible only to a few powers. Perhaps as important for India, some 60% of its components would reportedly be made in the country.

All of which suggests that India continues to view Russia as its primary source of top-end weaponry, much of which America and its allies remain reluctant to share. And that Mr Modi sees Russia, alongside any willing Western partners, as a means to strengthen India’s defence industry.

Yet here too India faces risks. Its defence co-operation with Russia has been plagued by problems, including the delayed delivery of the last two of five S-400 missile systems that it bought in 2018. Poor performance of some Russian weaponry in Ukraine has caused concern among Indian military leaders. And India has postponed or cancelled talks on several deals to buy or upgrade Russian equipment, citing logistical issues arising from the Ukraine war.

Mr Putin’s India trip, meanwhile, has been presented as a routine exercise following the two leaders’ vow to meet annually. Still, it would be his first trip to India since his full-scale invasion of Ukraine. And it could provoke the sort of PR disaster that marred Mr Modi’s Moscow visit, when he bear-hugged Mr Putin shortly after a deadly Russian missile strike on Ukrainian sites including a children’s hospital. Even



without another such atrocity, the visit is likely to undermine Mr Modi’s efforts to present India as a neutral party in the war.

For Indian officials the risks of strengthening ties with Russia appear to be acceptable. But they may be underestimating a longer-term problem. Russia is a useful short-term source of energy and technology. But its demographic and economic prospects are grim, even were peace to return. India is also exposing itself to fallout from Russia’s inevitable domestic turmoil—Mr Putin cannot live for ever—to say nothing of further Kremlin misadventures abroad. ■

## North Korea and Russia

# Blood debt

SEOUL AND WASHINGTON, DC

## What Kim Jong Un gains by sending troops to fight for Vladimir Putin

**N**ORTH KOREAN television viewers had a treat just after New Year’s Day. The state broadcaster aired “72 Hours”, a new film, according to NK News, a North Korean-focused news site. The movie tells the story of the first three days of the Korean war and how the conflict was started by the evil South. (In fact, North Korea’s founder, Kim Il Sung, launched the initial attack.) Among the propaganda messages embedded in the tale, a big one is the importance of close ties with Moscow. The film’s fans include the Russian ambassador in Pyongyang, North Korea’s capital.

These days Russia and North Korea are writing a new battlefield history together. North Korea has dispatched some 12,000 troops to fight in Vladimir Putin’s war against Ukraine. The soldiers are believed to be some of North Korea’s most elite, hailing from the “Storm Corps”, a special-forces outfit whose lineage may trace back to units sent on a daring but ultimately un-

successful mission to assassinate South Korea’s president in 1968. North Koreans began appearing at the Ukrainian front in early November and have entered in recent weeks into ever fiercer combat in Russia’s Kursk region, where Ukrainian forces seized territory last year.

The idea to send troops to aid Russia apparently originated from the North Korean side. The deployment brings big risks for Kim Jong Un, the country’s leader. The fighting has been gruelling. North Korean troops appear ill prepared for modern drone warfare and for the flat, open landscape around Kursk, unlike the mountainous terrain back home. On January 11th Volodymyr Zelensky, Ukraine’s president, said Ukraine had taken two North Korean soldiers prisoner. South Korean intelligence agencies estimate that perhaps 300 North Korean soldiers have been killed and another 2,700 wounded. Ultimately such losses “may influence North Korean society as well”, says Kim Yung-ho, South Korea’s minister of unification.

What does Mr Kim get in exchange? Probably more of the assistance that was already being sent in exchange for North Korean ammunition: fuel, food and other resources, which help North Korea withstand Western sanctions. Since North Korea began aiding Russia’s war effort around mid-2023, there have been “unprecedented levels of traffic” observed in satellite imagery of customs areas between the two, says Victor Cha of the Centre for Strategic and International Studies, an American think-tank. South Korean intelligence agencies reckon the North Korean state may be receiving as much as \$2,000 per month for each soldier it sends.

North Korea is also seeking higher-end capabilities. Designs for intercontinental ballistic missiles and re-entry vehicles, as well as submarine and satellite technology, are thought to be on the wishlist. Such assistance can be harder to spot. “It’s a blueprint in a suitcase; we won’t necessarily see it,” says Bruce Klingner of the Heritage Foundation, another American think-tank.

Western governments assess that Russia has become more willing to share technical knowledge that it once considered off-limits. During a recent visit to South Korea, Antony Blinken, America’s secretary of state, said that America believes Russia intends to share advanced space and satellite technology with North Korea in exchange for battlefield help.

Yet the exchange goes beyond material goods or weapons designs. There is also a “softer tech transfer” taking place, says Peter Ward of the Sejong Institute, a South Korean think-tank. North Korea can see how its ammunition and missiles perform in real battlefield conditions and against Western air-defence systems. Soldiers are also getting rare real-world exposure to the