

West Asia on the Edge: Strategic Strikes and India's Tightrope

Introduction

The Middle East is on the brink of a full-scale conflict following a sharp escalation between Israel, Iran, and the United States (US) and the consequent involvement of other nations in the region. A series of rapid and unprecedented military actions has reshaped the strategic landscape in the Middle East. Israel's Operation Rising Lion on 13 Jun targeted Iran's nuclear and military assets, prompting a massive Iranian retaliation with missile and drone strikes on Israeli cities. In a major escalation, the US launched Operation Midnight Hammer on 22 Jun, deploying B-2 bombers and bunker-busting bombs to strike fortified Iranian nuclear sites like Fordow and Natanz. While Washington declared the mission a success, global reactions have been mixed, with fears rising over a regional war and Iran's potential withdrawal from the Nuclear Non-Proliferation Treaty (NPT). The fallout threatens not only regional stability but also global energy markets, nuclear non-proliferation norms, and strategic alignments, placing India, with its deep interests in West Asia, at critical crossroads.¹

Israel Strikes First—Operation Rising Lion

Israel launched a pre-emptive and wide-ranging offensive targeting Iran's nuclear and military sites and high-ranking officials on 13 Jun. Using F-35 stealth fighters, drones, and covert special forces, the operation was aimed at crippling Iran's uranium enrichment program and dismantling Iran's nuclear infrastructure.² These strikes came amid Israel's contention that Iran was nearing a nuclear breakout threshold. The targets were known sites at Natanz, missile facilities, and Islamic Revolutionary Guard Corps command locations. The immediate provocation for the strikes was Iran's threat to withdraw from NPT.³

Anticipating the strikes, Iran retaliated immediately and forcefully on the same day. Hundreds of drones and ballistic missiles were launched toward various Israeli cities, including Tel Aviv and Haifa, overwhelming Israel's air defences. Although Israel's multi-layered missile defence systems, Iron Dome, David's Sling, and Arrow intercepted much of Iran's missiles, but could not ensure full proof protection. The sheer volume of Iran's missiles inflicted civilian and military casualties and damage. This tit-for-tat escalation marked the most direct confrontation between the two states in over a decade.⁴

Fordow and the Nuclear Non-Proliferation Treaty—Iran's New Red Lines

The situation intensified further when the US, in a surprise strike, used B-2 bombers and bunker-busting bombs to damage Iran's fortified nuclear strikes. The strikes marked the US's formal entry into the conflict and were necessitated as Fordow—one of the key locations suspected to be carrying out Uranium enrichment—could not be

targeted by Israel. Fordow is believed to be Iran's most heavily fortified nuclear facility buried under a mountain near Qom. It became clear that only the US developed GBU-57 'Massive Ordnance Penetrator' could meaningfully damage such a site, effectively drawing the US into the fray.

In response, Iran's parliament began deliberating a withdrawal from the NPT. The implications of exiting the NPT would remove all International Atomic Energy Agency (IAEA) oversight, allowing Iran to develop nuclear weapons openly. Already, the IAEA has confirmed uranium enrichment nearing 90 per cent, the threshold for weaponisation, in Iran. Such a move could spur similar ambitions in regional powers like Saudi Arabia, Turkey, and Egypt, undoing decades of nuclear restraint.⁵

The United States Joins the Fight—Operation Midnight Hammer

Despite last minute US' diplomatic outreach and President Donald Trump reiterating that he would consider any military action after two weeks, the US launched Operation Midnight Hammer on 22 Jun using B-2 bombers and Tomahawk cruise missiles to strike Iran's underground nuclear facilities, including Fordow, Isfahan, and Natanz.⁶ 14 GBU-57 bunker-busters were deployed. The US claimed that strikes were limited and not aimed at regime change.

While Israel's Prime Minister Netanyahu hailed President Trump's actions as a historic step to block Iranian nuclear ambitions, the US strikes represent an escalation. Though the US has declared the mission a success, claiming Iran's nuclear ambitions were 'Obliterated', military assessments remain cautious. Destruction of physical infrastructure is not equivalent to eliminating nuclear knowledge. More significantly, the operation was conducted without Congressional approval, igniting legal and political backlash in Washington and condemnation from several global actors.

Tehran's Options—Retaliation or Restraint?

Even after suffering significant infrastructure losses, Iran remains defiant. Isolated for decades and under heavy sanctions, its regime draws legitimacy from resistance. Any perception of backing down would threaten internal coherence. While Iran warned of dire consequences, its immediate response was restrained. Iran, in retaliation, launched heavier than usual missile attacks on Israel. Its Atomic Energy Organisation said that nuclear sites had been evacuated prior, avoiding radioactive fallout, and warned that the program would not be stopped.⁷

Tehran also initiated consultations with Russia and China, while threatening asymmetric responses, including the proxy attacks by Hezbollah, Iraqi militias, or Houthis. Iranian leaders have called every US military or civilian presence in the region a legitimate target, raising the prospect of an expanded regional war. It may also carry out cyber-attacks on the US or allied critical infrastructure and has warned of closing

Straits of Hormuz. It is also seriously contemplating withdrawal from the NPT, upending the global nuclear regime. As of 24 Jun, Iran responded to the US attacks on its nuclear facilities by targeting the US military base at the Al Udeid Air Base in Qatar.⁸

Strategic Repercussions—A Fragile Global Order

The Israeli strikes and the US involvement may lead to escalations and widening of the conflict in the region. The immediate repercussions are as follows:

- **Non-Proliferation Under Threat.** The NPT and IAEA safeguards face an existential crisis. The unilateral use of force sets dangerous precedents for resolving nuclear disputes.
- **Regional Reactions.** Traditional US allies like Oman, Qatar, Iraq, and Saudi Arabia have condemned the attacks. Even those opposing Iran's nuclear ambitions worry about further destabilisation.
- **Global Oil Markets.** The mere threat of Strait of Hormuz closure sent Brent crude prices soaring from USD 69 to USD 74 per barrel overnight, exposing how tightly are energy markets linked to West Asian volatility.

The Strait of Hormuz—A Global Lifeline at Risk

The Strait of Hormuz remains the world's most critical energy chokepoint. The strait, located between the Persian Gulf and the Gulf of Oman, is merely 21 miles wide at its narrowest point and is the only way to ship crude from Persian Gulf to the rest of the world. Iran controls its northern side. In 2024, it handled 20 million barrels per day, which is about 20 per cent of the global petroleum liquids consumption and over 25 per cent of the sea-borne crude oil trade. 84 per cent of Hormuz oil and 83 per cent of Liquefied Natural Gas (LNG) was destined for Asia, mainly China, India, Japan, and South Korea.⁹ The US, by contrast, sourced only 0.5 million barrels per day through the Strait of Hormuz, relying increasingly on domestic and Canadian production. Despite the regional tensions, the maritime traffic has not yet been blocked, though Brent crude prices rose on 12-13 Jun. Though alternate pipelines exist, such as Saudi Aramco's East-West pipeline and the United Arab Emirates' pipeline to Fujairah, they operate below capacity and offer limited rerouting. Iran launched the 3,00,000 barrels per day Goreh-Jask pipeline in 2021, but its usage has been minimal.

Diplomatic Urgency—Role of the United Nations (UN)

The global community, especially the UN Security Council, faces a rapidly shrinking window for de-escalation. Urgent steps, including imposition of ceasefire framework,

diplomacy, and reaffirming global support for the NPT, are needed to prevent the conflict from spiralling into a regional or global catastrophe.¹⁰ The UN Secretary-General told the Security Council on 22 Jun that air strikes by the US marks a 'Perilous Turn', warning that the region cannot endure yet another 'Cycle of Destruction'. The UN must consider initiating high-level dialogue amongst the key players—the US, Israel, Iran, and neutral intermediaries.¹¹ Whether these steps succeed or not will set stage for the next decade of West Asian geopolitics and future global nuclear stability.¹²

Indian Stakes

The confrontation has placed India in a diplomatically sensitive position, as it remains keen on balancing strategic ties with both nations. While India has strengthened its defence and technological partnership with Israel, including recent use of Israeli-origin weapons, it also relies on Iran for energy security, regional connectivity via the Chabahar Port, and access to Central Asia. India's response has been marked by its strategic autonomy policy with calls for de-escalation, distancing itself from anti-Israel statements by the Shanghai Cooperation Organisation, and quietly evacuating Indian nationals through 'Operation Sindhu'. Experts note that while this neutral stance protects India's interests for now, a prolonged conflict may test the limits of its diplomatic balancing act.

- **India's Energy Exposure and Diaspora Dilemma.** India is vulnerable to this crisis as it poses serious risks to its energy security and safety of its diaspora. Oil Minister Hardeep Singh Puri clarified on 22 Jun that India's oil supply chain is stable as of now due to diversification. He noted that "A large volume of India's supplies do not come through the Strait of Hormuz now". However, data from energy analytics firm Kpler highlights that despite recent diversification with increased imports from Russia and the US, India has reduced its dependency through Hormuz but 40 per cent of Indian oil still passes through the straits. Along with crude, LNG flows are harder to replace in the short term due to infrastructure constraints. Diversification is also not a substitute for redundancy. India imports oil from 13 countries, and regional shocks will impact global prices. In addition, fertilizer, transport, and power sectors too could be hit, in case of any blockade at Hormuz. India also has a large diaspora in the region and may have to plan for evacuating over 9 million Indians residing across the Gulf.¹³

- **Strategic Challenges.** India maintains good ties with all the warring parties. With vital interests tied to both the US and Iran, taking sides could jeopardise its relationships. New Delhi's response must blend strategic neutrality with proactive contingency planning. India's best response lies in maintaining strategic neutrality and avoiding alignment with either bloc.

- **Infrastructure Investments.** India's policy of multi-polarity is nonetheless fraught with complexity due to its relations with all parties to the conflict. Its vital infrastructure investments, especially the Chabahar Port, is an important element in India's Central Asia outreach. India's immediate priorities include enhancing energy diversification and preparing for diaspora repatriation. It must pursue quiet diplomacy leveraging ties with all stakeholders.¹⁴

Conclusion

The Middle East is once again on the brink of major conflagration. The US' strikes represent a risky escalation which could spiral into a full-scale war. The Middle East stands on the edge of a wider and more dangerous conflict, with diplomacy faltering and military escalation dominating the landscape. Whether through restraint or retaliation, what comes next will define the future of non-proliferation, regional order, and global security. In this high-stakes environment, India faces an acute strategic dilemma. While it has its priorities clear, there is a need for urgent diplomatic agility to ensure safety of its diaspora, maintain energy security, and avoid being drawn into great-power rivalries.

Endnotes

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