BUSINESS LINE, Delhi, 27.8.2025
Page No. 3, Size:(12.71)cms X (12.49)cms.

'US can become a major crude oil and gas supplier to India'

ENERGY PUSH. US committed to bilateral energy security: Top Embassy official

Rishi Ranjan Kala
New Delhi

At a time when the US President Donald Trump is pressuring India to stop buying Russian crude oil, the US Embassy in India is emphasising that the North American country can become a major supplier of oil and gas to the world's third largest energy consumer.

A top official from the US embassy in India on Tuesday noted that the US is committed to collaborate with India for exporting high-quality products and services to achieve energy security and economic growth.

Addressing the Indo-American Chamber of Commerce's (IACC) energy summit, Xiabing Feng, Principal Commercial Officer, US Embassy in India, said, "As we look into the future, the US remains committed to working with India through the export of high-quality work-class products and services, to help India achieve its goals of energy security and economic growth."

FUTURE PLANS. The US and India share a commitment to diversify energy resources and enhance infrastructure REUTERS

The official added that the US can be a major supplier of crude oil and liquefied natural gas (LNG) to India.

She noted that during Prime Minister Narendra Modi's visit to the US, he and President Trump had reaffirmed their roles as leading consumer and producer in shaping the global energy markets and assured commitment for bilateral energy security partnership, including oil, gas and nuclear energy.

"As we meet at this critical structure, the global energy landscape is undergoing profound transformation. Geopolitical instability, the markets, the destruction in supply chains have exposed vulnerability and underscore the interest in ensuring that we operate secure energy systems for our economies," Feng pointed out.

GRID MODERNISATION

The US and India share a commitment to diversify energy resources and enhance infrastructure. By elaborating American expertise in natural gas, nuclear energy and emerging energy technologies, the US can support India's ambitious goals for energy security and grid modernisation.

US companies can sell products and also partner with Indian players both in terms of energy security and grid modernisation.

Atul Chauhan, Regional President at IACC, was of the view that both the countries should secure critical minerals, scale up solar module capacities and nuclear power technologies and invest in grid modernisation. Collaboration between India and the US can unlock not only technology transfer, but also co-investments in a resilient ecosystem, he added.

Sunil Jain, Chairman of Climate Change & ESG at IACC, stressed on the need for an integrated approach involving various energy sources and technologies including nuclear and small modular reactors along with conventional sources and other emerging technologies.

PIONEER, Delhi, 27.8.2025
Page No. 14, Size:(16.14)cms X (18.96)cms.

ARUNACHAL TO GET CITY GAS DISTRIBUTION NETWORK

Arunachal Pradesh is set to get a city gas distribution network with Bharat Petroleum Corp Ltd (BPCL) and Oil India Ltd (OIL) signing an agreement on Tuesday to set up a joint venture company to implement the project.

As a part of the project, Compressed Natural Gas (CNG) stations will be set up and Piped Natural Gas (PNG) will be supplied to households, commercial units, and industries in the state, a statement said.

FREE PRESS JOURNAL, Mumbai, 27.8.2025
Page No. 17, Size:(4.78)cms X (6.26)cms.

BPCL, OIL form joint venture

PTI
NEW DELHI

State-owned Bharat Petroleum Corporation Ltd (BPCL) and Oil India Ltd have formed a joint venture company for creating a gas distribution network in Arunachal Pradesh, the firms said on Tuesday. The firms signed an agreement to formalise the joint venture company (JVC).

"The JVC will create a gas distribution network in Arunachal Pradesh, which includes the establishment of Compressed Natural Gas (CNG) stations and the provision of piped natural gas (PNG) to domestic, commercial, and industrial consumers," they said in a statement.

"This initiative aims to enhance access to clean energy and contribute to the socio-economic development of the state, in alignment with the government's vision of fostering a gas-based economy."

The government is targeting to increase the share of natural gas in the energy basket to 15% by 2030 from current over 6%. City gas distribution, which involves sale of CNG to automobiles and piping the gas for household cooking and industries, is seen a big driver.

Speaking on the occasion, Oil India Ltd Chairman and Managing Director Ranjit Rath said, "The establishment of city gas distribution in Arunachal Pradesh is a significant step in OIL's ongoing initiative to realise the vision of bringing clean and reliable energy to the region.

BUSINESS STANDARD, Delhi, 27.8.2025
Page No. 7, Size:(24.90)cms X (13.63)cms.

BPCL, OIL form JV for city gas project in Arunachal Pradesh

State-owned Bharat Petroleum Corporation Ltd (BPCL) and Oil India Ltd have formed a joint venture company for creating a gas distribution network in Arunachal Pradesh, the firms said on tuesday. The firms signed an agreement to formalise the joint venture company (JVC). "The JVC will create a gas distribution network in Arunachal Pradesh, which includes the establishment of compressed natural gas (CNG) stations and the provision of piped natural gas (PNG) to domestic, commercial, and industrial consumers," they said in a statement.The government is targeting to increase the share of natural gas in the energy basket to 15 per cent by 2030. PTI

MILLENNIUM POST, Delhi, 27.8.2025
Page No. 11, Size:(15.24)cms X (23.88)cms.

Nayara Energy appoints SOCAR Turkiye CFO as new Chief Executive

NEW DELHI: Russian oil giant Rosneft-backed Nayara Energy has appointed Teymur Abasguliyev as the new CEO of the company, replacing a European national who had to resign following EU sanctions on the company.

The appointment of Abasguliyev, an Azerbaijan national who currently as the CFO at SOCAR Turkiye Enerji A.S, was confirmed by the Nayara board at its meeting on Tuesday, two sources aware of the matter said.

Nayara spokesperson did not immediately respond to an email sent for comments.

Educated at Azerbaijan's Baku State University, Abasguliyev previously worked at PricewaterhouseCoopers from 1996 to 2013. He has been the CFO of Group Companies at SOCAR Turkiye Enerji A.S. since 2013.

Nayara Chief Executive Alessandro Des Dorides had to quit shortly after the EU imposed sanctions on the refiner as part of a new raft of measures against Russia over its war with Ukraine. Sergey Denisov, who was Nayara's Chief Development Officer, was named the interim CEO following the resignation. Directors and senior executives, including Victoria Cunningham, Avril Conroy, Jorg Tumat, Barbara Oberhauser, and another refinery head, resigned due to EU sanctions-related nationality conflicts. PTI

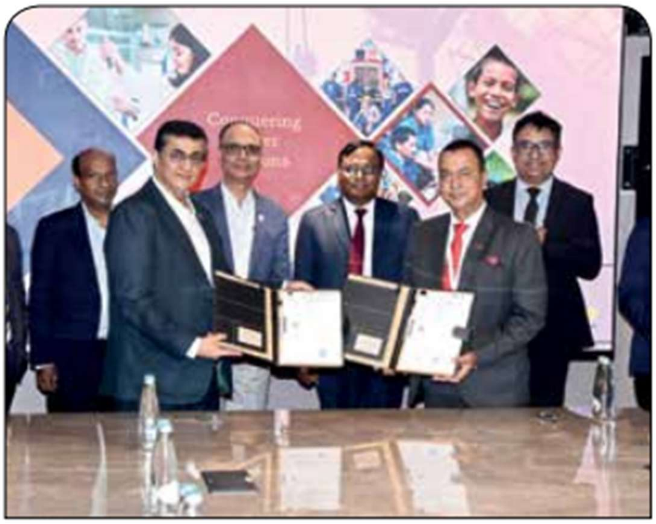
FREE PRESS JOURNAL, Mumbai, 27.8.2025
Page No. 18, Size:(3.12)cms X (7.05)cms.

Oil India:

- Oil India AND Bharat Petroleum Corporation (BPCL) both Maharatna Public Sector Enterprises, have formalized a Joint Venture Agreement (JVA) to establish a Joint Venture Company (JVC).
- The JVC will create a gas distribution network in Arunachal Pradesh, which includes the establishment of Compressed Natural Gas (CNG) stations and the provision of Piped Natural Gas (PNG) to domestic, commercial, and industrial consumers.
- This initiative aims to enhance access to clean energy and contribute to the socio-economic development of the state, in alignment with the Government's vision of fostering a gas-based economy.

MILLENNIUM POST, Delhi, 27.8.2025
Page No. 10, Size:(15.65)cms X (21.27)cms.

OIL, BPCL INK CGD PACT



Oil India Ltd (OIL) and Bharat Petroleum Corporation Ltd (BPCL) on Tuesday formalised a Joint Venture Agreement (JVA) at the BPCL Corporate Office to establish a Joint Venture Company (JVC). The agreement was signed in the presence of Dr. Ranjit Rath, Chairman & MD, OIL and Sanjay Khanna, Director (Refineries) with Additional Charge of Chairman & MD, BPCL. The JVC will create a city gas distribution (CGD) network in Arunachal Pradesh, which includes the establishment of Compressed Natural Gas (CNG) stations and the provision of Piped Natural Gas (PNG) to domestic, commercial, and industrial consumers. MPOST

BUSINESS LINE, Delhi, 27.8.2025
Page No. 3, Size:(15.95)cms X (6.65)cms.

ONGC mulls trading unit for crude, petro products arms

Our Bureau
New Delhi

State-run ONGC is considering the creation of a consolidated trading unit for its subsidiaries. The platform will make collective decisions on the sale and procurement of almost 100 million tonnes (mt) of crude oil and refined petroleum products.

Rajarshi Gupta, Managing Director, ONGC Videsh (OVL), stated that the plan is currently at a "conceptual stage" and a group has been formed to deliberate on the modalities.

Speaking to reporters, Gupta said that ONGC produces around 42 mt of crude oil.

Besides, its subsidiary Hindustan Petroleum Corporation (HPCL) procures around 30-35 mt of crude oil. Similarly, Mangalore Refinery and Petrochemicals (MRPL) purchases around 18-20 mt of crude oil. Add to this, the 10.5 mt of oil produced by OVL.

"So as a group, ONGC has around 100 mt of actual buying and selling of crude oil. If we can get all of this together and do something, it will be helpful. This is in the planning stage as of now. A group has been formed that will look into the modalities. It is at a conceptual stage. This will be backed by actual production," he added.

Rajarshi Gupta, MD, ONGC Videsh

ONGC TRADING GROUP

Speaking at a panel discussion during the Indo-American Chamber of Commerce's (IACC) energy summit here, Gupta elaborated on the nuances of creating a trading platform.

"PSUs have not done trading in the trading sense. We have done tendering, we have done swap. But actual trading where you don't own the molecule and you are a trader and it changes hands in the high seas multiple times before being delivered...So, I am very happy to share that we have created a commodity trading group of oil and gas in ONGC, exclusively for trading," he said.

Elaborating on the rationale behind such a platform, he said the E&P firm expects that in the near future, a trading platform will be required for India, especially with so many sources (for procuring crude) and so much peak demand happening and considering an expanding economy.

"So, if you have the backup of the actual molecule with you, (it's) much easier to do trading, rather than speculative trading. Trading is the next step that we need to do and we are moving in that direction and we believe that sister PSUs will also be doing it," Gupta emphasised.

MILLENNIUM POST, Delhi, 27.8.2025
Page No. 11, Size:(15.82)cms X (17.42)cms.

ONGC planning to set up trading unit for crude & refined fuels of group cos

NEW DELHI: State-owned ONGC is planning to set up a trading unit for the crude and refined fuels of its group companies, a top executive at ONGC Videsh Ltd (OVL) said at an industry event.

OVL is the overseas investment arm of ONGC and annually produces about 10 million tonnes of oil through its assets. The plan is at a preliminary stage and "an internal group has been formed to discuss and look into the modalities, including legal issues," said Rajarshi Gupta, MD at ONGC Videsh. The trading unit will help ONGC look at sales and purchase of crude oil and refined fuels, *Reuters* reported.

ONGC annually produces about 42 million tonnes of oil, while its refining subsidiaries Hindustan Petroleum Corp and Mangalore Refinery and Petrochemicals together import about 45-50 million tonnes. "We control about 100 million tonnes of oil within the group," said Gupta. AGENCIES

MINT, Delhi, 27.8.2025
Page No. 9, Size:(5.74)cms X (7.02)cms.

ONGC plans oil, gas, chem trading unit

State-run ONGC is looking at setting up a trading unit for oil & gas, petroleum products and petrochemicals, said Rajarshi Gupta, managing director of ONGC Videsh Ltd (OVL).

Addressing the 3rd Energy Summit of Indo-American Chamber of Commerce, Gupta said that trading would be the key step for oil and gas companies of the country.

"We have created a commodity trading group of oil and gas in ONGC, exclusively for (looking into the aspect of) trading. Trading will be required for India especially with so many sources and so much peak demand with the economy growing," he said, adding that the plan is in a conceptual stage. **RITURAJ BARUAH**

MORNING STANDARD, Delhi, 27.8.2025
Page No. 10, Size:(24.90)cms X (16.92)cms.

ONGC to launch crude and refined fuel trading unit for group companies

ENS ECONOMIC BUREAU @ New Delhi

STATE-owned Oil and Natural Gas Corporation (ONGC) is planning to establish a trading unit for crude oil and refined fuels for its group companies, said Rajarshi Gupta, managing director, ONGC Videsh, the overseas arm of ONGC.

Gupta clarified that the plan is still at a preliminary stage, with an internal group formed to discuss the modalities, including legal and operational issues. "The trading unit will help ONGC streamline the sales and purchase of crude oil and refined fuels," Gupta added. He added that ONGC currently produces 42 million

tonne of crude oil annually, while its refining subsidiaries Hindustan Petroleum Corporation (HPCL) purchases 30 million tonne, and Mangalore Refinery and Petrochemicals (MRPL) imports about 18 to 20 million tonne.

"As a group, we handle around 100 million tonnes of oil in terms of buying and selling. Coordinating this through a centralized trading unit will significantly improve efficiency and strategic planning," Gupta added. ONGC Videsh, which manages ONGC's overseas oil and gas assets, contributes approximately 10 million tonnes of oil production annually.

FINANCIAL EXPRESS, Delhi, 27.8.2025
Page No. 2, Size:(38.50)cms X (18.86)cms.

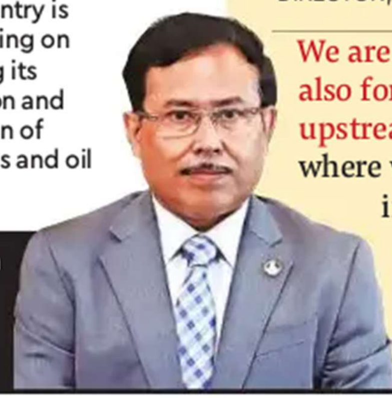
OVL eyeing LNG, upstream assets in US

ONGC to set up trading unit for crude and refined products

ARUNIMA BHARADWAJ
New Delhi, August 26

FAST GROWTH

- India is facing **50%** tariffs from the US on its purchases of Russian oil
- The country is also focusing on enhancing its exploration and production of natural gas and oil
- ONGC plans to establish a new unit for trading crude oil, refined products and natural gas for group firms



RAJARSHI GUPTA, MANAGING DIRECTOR, ONGC VIDESH

We are looking at the US also for other LNG and upstream connections where we can look to invest plus other countries which are coming into the market...

STATE-RUN ONGC VIDESH, the overseas operations arm of Oil and Natural Gas Corp, is looking to invest in the LNG and upstream assets in the US, the company's managing director Rajarshi Gupta said on Tuesday.

He added that the company is scouting for more greenfield and brownfield assets in several other geographies, including Latin America, Africa and West Asia.

"We are looking at the US also for other LNG and upstream connections where we can look to invest plus other countries which are coming into the market as more and more LNG players come to deliver in the market," Gupta said at the third energy summit of the Indo-American Chamber of Commerce.

"We are looking for the right assets in the US. We have three projects in Russia but we are also looking at other geographies," he said, while naming Latin America, and Africa, which he said "has huge potential" being rich in minerals.

"We are looking at all options. As the government said, we will source our energy for our citizens where it is feasible, practical, and at the right price...," Gupta said.

The statement comes at a time when India is facing 50% tariffs from the US on its purchases of Russian oil. The country is also focusing on enhancing its exploration and production of natural gas and oil, domestically and internationally, amid rising geopolitical uncertainties.

The company is also expecting the force majeure on its offshore LNG project in Mozambique to be removed shortly.

ONGC Videsh holds a 10% stake in the "Offshore Area 1 LNG" project with a cost of $20 billion. The project has been under force majeure since April 2021 following attacks by Islamic State terrorists in Northern Mozambique's Cabo Delgado province. However, the company expects the force majeure to be removed soon and start gas production from the project in the next three years.

On the domestic production front, Gupta said, "We are drilling now in Andaman and eastern offshore and the petroleum system has been established. So the next big discoveries could be there."

Apart from enhancing its portfolio, OVL's parent company ONGC is planning to establish a new unit for trading crude oil, refined products and natural gas for its group companies.

"We have created a commodity trading group at ONGC exclusively for trading. We do see in the near future trading will be required for India," Gupta said.

ECONOMIC TIMES, Delhi, 27.8.2025
Page No. 5, Size:(16.60)cms X (9.09)cms.

'COUNTRY FIRST, COMMERCE LATER'

Refiners Unlikely to Halt Russia Crude Buys

Sanjeev Choudhary

New Delhi: Indian refinery executives see little chance of the government ordering a halt to Russian oil purchases despite America's penalty, as India hardens its stance on US trade negotiations.

"The message from the government is 'country first, commerce later'," an industry executive said, interpreting this as the primacy of trade negotiations over short-term economic pain. India has dug in on talks with US, and conceding on crude would only invite further demands, executives and officials said, adding that focus is on projecting strength. PM Narendra Modi, external affairs minister S Jaishankar and commerce minister Piyush Goyal have all signalled that India would rather absorb the blow to exporters than bow to US pressure.

The government has issued no directive to refiners to stop Russian crude purchases, executives said. Still, refiners placed lower orders for September-loading cargoes compared with this year's average amid tariff uncertainty. Executives, however, attributed this to narrower discounts of $1.5-$1.7 per barrel on Russian crude, compared with $2.5-$3 last year. With discounts slowly widening again, volumes for October-loading may rise, an executive said.

Switching away from Russian oil would not be difficult, given a well-supplied global market and low prices, but conceding to US pressure is unacceptable, executives and officials said. A quick shift to non-Russian supplies would have only a marginal and temporary impact on global prices, they added.

"Supply lines will only have to readjust. Russian oil is not sanctioned and will remain on the global market. The balance between supply and demand will not be swayed," one executive said, noting that buyers of discounted Russian barrels in place of Indian refiners would simply substitute their original supplies.

Industry executives are closely watching the situation, mindful of the challenge of ensuring timely and adequate crude supplies for their refineries.

Russian oil buy may go down further in next two months

FE BUREAU
New Delhi, August 26

INDIA'S STATE-CONTROLLED AND private refiners are expected to further reduce their purchases of Russian oil for September and October. Initial tanker data suggest a slump in loadings of Russian crude to India for these two months, which will give a clearer picture of the impact of the additional tariffs imposed by the US.

Industry sources said July and August have already seen a decline in deliveries of Russian crude at Indian ports, but that had little to do with the US tariffs as those cargoes would have been booked weeks before US President Donald Trump announced additional tariffs on Indian goods early August.

The top state-owned refiners and private refiners, including Reliance Industries and Rosneft-linked Nayara Energy, are projected to book between 1.4 million barrels per day (bpd) to 1.6 million bpd of Russian crude for October loading, anonymous sources familiar with the plans told *Bloomberg*. The volume of purchases from Russia for October would be up to 400,000 bpd below the average Russian oil imports of 1.8 million bpd for the first quarter. The drop in Russian oil buying could be a slight concession to the US tariff pressure, but it's also a sign that Indian refiners don't intend to halt the economics-driven trade to buy cheap crude.

INDIA'S RUSSIAN CRUDE IMPORTS

Trump tariffs: Russian oil loadings slump, Sept-Oct deliveries to offer more clarity

SUKALP SHARMA
NEW DELHI, AUGUST 26

Crude oil tanker Nevskiy Prospect, owned by Russia's tanker group Sovcomflot, transits the Bosphorus in Istanbul. *Reuters File*

AMID THE US rhetoric against India's Russian oil imports, the key question is whether Indian refiners will meaningfully cut their appetite for Russian crude. While July and August have already seen a decline in deliveries of Russian crude at Indian ports, industry insiders attribute that largely to shrinking discounts on Moscow's oil, and not American pressure, as those cargoes would have been booked weeks before US President Donald Trump upped the ante against India in July and announced additional tariffs on Indian goods early August.

Russian oil deliveries scheduled for September and October would give a clearer picture on the impact of Trump's tariff tantrums over India's hefty imports of Russian crude. On that count, initial tanker data does suggest a slump in loadings of Russian crude to India — likely to be discharged at Indian ports in September and October — from July levels. Notably though, it may still be too early to say whether Trump's pressure tactics have indeed led to a marked change in Indian refiners' Russian oil imports. That is because a number of tankers laden with Russian crude are headed towards Egypt's Port Said, which means that the possibility of these cargoes making their way to India cannot be ruled out.

"Looking at the latest numbers, Russian crude loadings to India are currently tracking about 37 per cent lower month-on-month for August (as of August 24), at around 1 million bpd (barrels per day). However, this could still change. Several vessels are heading toward Port Said, Egypt, which typically indicates they will transit the Suez Canal. In the past, we've seen such ships update their final destinations while en route. All Russian flows to India in July passed through the Suez Canal, so it remains a key transit route," said Sumit Ritolia, lead research analyst, Refining & Modeling at Kpler, a global real-time data and analytics provider.

"At a more granular level, up to August 24 we observed a notable increase in cargoes that have sailed from Russian ports without a declared discharge destination. Vessel tracking data shows that many of these tankers discharged their previous two to three cargoes at Indian refineries, suggesting India remains a strong potential outlet. However, it is also possible that some of these barrels could be diverted to other Asian buyers that continue to take Russian crude," Ritolia said.

'No change in strategy on Russian crude'

India's public sector refiners have publicly stated that they have not received any directive or indication from the government with respect to their Russian oil imports, and their strategy on buying Moscow's crude continues to be dictated by economic and commercial considerations. The Indian government continues to maintain that the country will buy oil from wherever it gets the best deal, as long as the oil is not under sanctions. Russian oil is not under sanctions, and is only subject to a price cap imposed by the US and its allies that applies if Western shipping and insurance services are used for transporting the oil.

Indian refiners' hefty imports of Russian crude have surfaced as a major irritant for the Trump administration. Earlier in August, Trump announced an additional 25 per cent tariff — over and above the 25 per cent tariff announced on Indian goods — as a penalty for India's Russian oil imports. New Delhi has called the targeting of India over the purchase of Russian oil "unjustified and unreasonable" and said these imports began as its traditional supplies were diverted to Europe, with the US having "actively encouraged such imports by India for strengthening global energy markets stability".

The additional tariff has had no bearing on Indian refiners' Russian oil import strategy, and purchases continue to be guided purely by economic and commercial considerations, according to top officials at India's public sector refiners.

The renewed pressure from the US and other Western powers — pressuring India to cut down on imports from the country — is aimed at forcing the Kremlin's hand into ending the Ukraine war. For Trump, who wants the three-year-old Russia-Ukraine war to end within days, this is an opportune time to pressure India over its Russian imports, given the protracted trade pact negotiations between New Delhi and Washington have hit major roadblocks.

When Russia invaded Ukraine in February 2022, Moscow's share in New Delhi's oil imports was less than 2 per cent. With much of the West shunning Russian crude following the invasion, Russia began offering discounts on its oil to willing buyers. Indian refiners were quick to avail the opportunity, leading to Russia — earlier a peripheral supplier of oil to India — emerging as India's biggest source of crude within a matter of months, displacing the traditional West Asian suppliers. Russia now accounts for 35-40 per cent of India's total oil imports by volume.

August deliveries hold steady

As of August 24, India's Russian oil imports for the month were 1.6 million bpd, flat on a month-on-month basis, but down 24 per cent from June levels, per vessel tracking data from Kpler. Industry insiders have attributed the decline largely to a significant erosion in discounts on Russian oil. Earlier this month, Bharat Petroleum Corporation's (BPCL) director (Finance) Vetsa Ramakrishna Gupta said in an investor call that the discount on Russian crude had contracted to just around $1.5 per barrel, which had led to import volumes dipping a bit as Moscow's oil lost much of its price advantage over competing crude grades.

"So far in August, Russian crude imports into India have stayed relatively steady. But that's less a sign of defiance and more about timing — most of these cargoes were likely locked in weeks earlier, in June or early July, well before any policy shifts came into play. If refiners do start to adjust their buying behavior in response to sanctions talk, we probably won't see it reflected in the data until late September or October arrivals...for now, it's business as usual for Russian crude imports by Indian refiners, but with increased caution," Ritolia said, adding that unless there is a clear policy directive or a prolonged disruption in trade economics, Russian crude will likely remain a core part of India's supply mix.

New Delhi appears eager to increase import volumes from other suppliers to strengthen its energy security and keep dependencies on one or a small group of suppliers in check. According to industry watchers, there is a growing appetite for optionality on crude oil imports—not necessarily a move away from Russia, but a desire to keep other doors open as a hedge against potential disruptions and supply loss in case Russian oil indeed becomes unviable. In all, India's oil import basket includes crudes from around 40 countries already, although a bulk of the supplies are from Russia and West Asia.

NAVBHARAT TIMES, Delhi, 27.8.2025
Page No. 16, Size:(19.42)cms X (12.62)cms.

रूसी तेल खरीद पर भारत पर 25% अतिरिक्त टैक्स लगाने से पूतिन पर दबाव नहीं बना पाएंगे ट्रंप

इसमें US का घाटा, भारत का कुछ ही जाता

प्रणब ढल सामंता

अगर अमेरिका रूस की कच्चे तेल (क्रूड ऑयल) से होने वाली आमदनी को रोकना चाहता है तो उसने रूसी तेल पर प्रतिबंध क्यों नहीं लगाया? ईरान और वेनेजुएला क्रूड पर उसने ऐसा ही किया था। फिर रूस के मामले में उसने भारत पर 25% एक्स्ट्रा टैरिफ लगाकर 'अप्रत्यक्ष दबाव' बनाने का रास्ता क्यों चुना?

ग्लोबल प्लेयर | कच्चे तेल के उत्पादन में रूस दुनिया में दूसरे नंबर पर है। वह करीब 10% ग्लोबल डिमांड पूरी करता है। इसलिए मार्च 2022 में जब कच्चे तेल का भाव $137 प्रति बैरल तक जा पहुंचा तो डर बना कि रूसी तेल पर पाबंदी लगाई गई तो भाव $200 प्रति बैरल तक पहुंच जाएगा।

यूरोपीय संघ का रास्ता | इसलिए G7 के समर्थन से यूरोपीय संघ ने 'कीमतों पर नियंत्रण (प्राइस कैपिंग)' वाला रास्ता चुना। इसमें तेल की अंतरराष्ट्रीय कीमतों की तुलना में रूसी तेल को काफी कम भाव पर खरीदा जा रहा था। सोच यह थी कि इससे हर बैरल पर उसे कम पैसा मिलेगा। साथ ही, रूस से माल ढुलाई करने वाले जहाजों के लिए इंश्योरेंस-रीइंश्योरेंस पर भी पाबंदी लगाई गई। मकसद रूस से माल की ढुलाई की लागत बढ़ाना था।

भारत नियम से चला | भारत ने यूरोपीय संघ की ओर से तय कीमत पर रूस से तेल खरीदना जारी रखा। रूस ने भी भारतीय बंदरगाहों पर उस कीमत पर तेल की डिलिवरी जारी रखी, जिसकी मांग भारत की ओर से की गई। इसी वजह से 2021-22 में भारत के कुल तेल आयात में जहां रूस का योगदान 1% से भी कम था, वहीं 2023-24 में यह करीब 36% हो गया।

चीन-तुर्किये बड़े खरीदार | पिछले तीन वर्षों में रूस ने जितना तेल बेचा है, उसमें चीन ने 47% की खरीदारी की है। इस दौरान भारत ने 38% और यूरोपीय संघ-तुर्किये ने 6% की खरीदारी की। दिलचस्प बात यह है कि तुर्किये जो नैटो का सदस्य देश है, वह रूस से रिफाइंड पेट्रो-प्रॉडक्ट्स का सबसे बड़ा आयातक है। रूस से रिफाइंड पेट्रो-प्रॉडक्ट्स के निर्यात में उसका योगदान 26% और चीन का 13% है।

नकली चेहरा | ट्रंप सरकार इन बातों पर खामोश है। उसकी वजह यह है कि यह समस्या उससे अधिक जटिल है, जैसा अमेरिका इसे दिखा रहा है। यूरोपीय संघ ने पिछली जुलाई में रूस से मंगाए गए कच्चे तेल से रिफाइंड प्रॉडक्ट्स के आयात पर प्रतिबंध लगाया तो उससे सहयोगी देशों अमेरिका, नॉर्वे, कनाडा, ब्रिटेन और स्विट्जरलैंड को छूट दी गई। वहीं, 6 महीने बाद अगर कोई भारत से रिफाइंड पेट्रो प्रॉडक्ट्स खरीदता है तो उसके लिए सर्टिफिकेशन की जरूरत होगी।

तेल का असली खेल

- चीन, तुर्किये, यूरोपीय संघ भी रूस से तेल-गैस के बड़े खरीदार
- अमेरिका ने रूस से खरीदा हजारों करोड़ रुपये का यूरेनियम
- भारत अब शायद ही अमेरिका को भरोसेमंद सहयोगी माने

गैस का हाल | ये तो हुई कच्चे तेल की बात, आइए अब जरा रूसी नैचरल गैस की चर्चा कर लें। पिछले तीन वर्षों से यूरोपीय संघ रूसी LNG का सबसे बड़ा आयातक रहा है। रूस के कुल LNG निर्यात में उसकी हिस्सेदारी 51% रही है। इसके बाद 21% के साथ चीन और 18% के साथ जापान का नंबर आता है। पाइपलाइन गैस में भी यूरोपीय संघ 37% के साथ सबसे आगे है। उसके बाद 30% के साथ चीन और 27% के साथ तुर्किये का नंबर आता है।

यूरेनियम की खरीद | यूरेनियम जैसे क्रिटिकल मिनरल्स की बात करें तो पिछले साल अमेरिका को रूसी यूरेनियम की बिक्री पर रोक लगाई गई, लेकिन लगे हाथ कुछ रियायतें भी दी गईं। इससे अमेरिका ने रूसी यूरेनियम की खरीद जारी रखी। सिर्फ इस साल के पहले पांच महीनों में अमेरिका ने रूस से 5000 करोड़ रुपये से अधिक का यूरेनियम आयात किया है।

टारगेट है भारत | इससे यह स्पष्ट हो जाता है कि ट्रंप ने भारत को खासतौर से टारगेट किया है क्योंकि यूरोपीय संघ, चीन, तुर्किये और एक हद तक खुद अमेरिका, रूस से तेल-गैस, रिफाइंड पेट्रो-प्रॉडक्ट्स व यूरेनियम खरीदते रहे हैं। यूरोपीय संघ ने हंगरी-स्लोवाकिया जैसे देशों को भी अपनी पाबंदियों से छूट दी। इस साल जून तक जापान को रूसी ऑयल फील्ड सखालिन-2 से कच्चा तेल खरीदने की छूट मिली हुई थी। दूसरी तरफ, भारत को कोई रियायत नहीं मिली और उसने यूरोपीय संघ की ओर से तय कीमत पर रूस से तेल खरीदा। इसके बावजूद अमेरिका ने सिर्फ भारत पर अतिरिक्त टैरिफ लगाया है।

रिश्ते पर आंच | सच यह है कि भारत पर अतिरिक्त टैरिफ लगाने से रूस के तेल मार्केट पर असर नहीं होगा बल्कि अमेरिका के साथ उसका कारोबार प्रभावित होगा। इससे दोनों देशों के रिश्ते पर आंच भी आएगी। भारत को आर्थिक चोट भी पहुंचेगी, लेकिन अमेरिका को लंबी अवधि में इसके राजनीतिक दुष्परिणाम भी भुगतने होंगे। उसके लिए न सिर्फ हिंद-प्रशांत क्षेत्र की रणनीति दांव पर होगी बल्कि निवेश प्रभावित होगा और मार्केट्स पर भी बुरा असर पड़ेगा। इसके साथ भरोसेमंद सहयोगी के रूप में उसकी छवि भी प्रभावित होगी। भारत आगे शायद ही अमेरिका को भरोसेमंद सहयोगी मानेगा।

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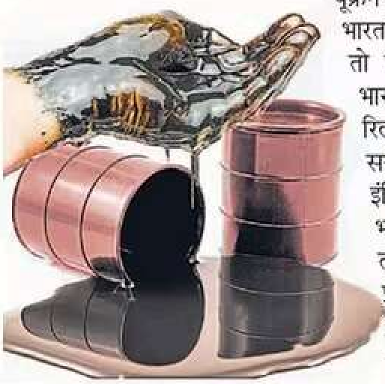
भारत रूस से कच्चे तेल की खरीद कम करेगा

नई दिल्ली, एजेंसी। रूसी कच्चे तेल के सबसे बड़े खरीदारों में से एक, भारत के रिफाइनर, आने वाले सप्ताहों में अपनी खरीद में कटौती करने की योजना बना रहे हैं। यह अमेरिकी शुल्क में बढ़ोतरी से एक दिन पहले वाशिंगटन के नीतिनिर्माताओं के लिए एक मामूली राहत वाली खबर है, लेकिन साथ ही यह इस बात का भी संकेत है कि भारत की मास्को के साथ संबंध तोड़ने की कोई योजना नहीं है।

ब्लूमबर्ग की खबर के मुताबिक मामले की जानकारी रखने वाले लोगों ने बताया कि रिलायंस इंडस्ट्रीज सहित सरकारी और निजी रिफाइनर अक्टूबर और उसके बाद की लोडिंग के लिए प्रतिदिन 1.4 मिलियन से 1.6 मिलियन बैरल तेल खरीदेंगे। उन्होंने नाम न बताने की शर्त पर बताया कि वे सार्वजनिक रूप से बोलने के लिए अधिकृत नहीं हैं। इसकी तुलना में वर्ष की पहली छमाही में औसतन 1.8 मिलियन बैरल प्रतिदिन तेल की खरीदारी हुई थी।

भारत के साथ व्यापार घाटा कम करने के लिए उत्सुक ट्रंप प्रशासन ने रूस के साथ भारत के ऊर्जा व्यापार पर दबाव बढ़ा दिया है। इसमें बुधवार से लागू होने वाले अमेरिकी टैरिफ को दोगुना करना भी शामिल है। जानकारों का कहना है कि यदि भारत ट्रंप के साथ व्यापार समझौता कर लेता है और अमेरिका यूक्रेन के साथ रूस के युद्ध के लिए भारत पर दबाव कम कर देता है, तो स्थिति बदल सकती है।



भारत के तेल मंत्रालय, रिलायंस, नायरा एनर्जी, सरकारी तेल शोधक कंपनियों इंडियन ऑयल कॉर्पोरेशन, भारत पेट्रोलियम कॉर्पोरेशन तथा हिंदुस्तान पेट्रोलियम के प्रवक्ताओं ने टिप्पणी हेतु भेजे गए ईमेल का तत्काल कोई जवाब नहीं दिया।