



Delhi Policy Group

Advancing India's Rise as a Leading Power

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ABOUT US

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Cover Images:

Indian Prime Minister, Narendra Modi, hosted the President of the European Commission, Ursula von der Leyen and the European Commission in Delhi on February 28, 2025. Source: [X/@narendramodi](https://twitter.com/narendramodi)

India's External Affairs Minister, Dr. S. Jaishankar with High Representative of the European Union for Foreign Affairs and Security Policy, Kaja Kallas in Johannesburg, South Africa on February, 21, 2025. Source: [Ministry of External Affairs](https://www.mea.gov.in)

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Focus Europe:

Shaping a Renewed EU-India Strategic Agenda

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Shaping a Renewed EU-India Strategic Agenda

by

Ambassador Ruchira Kamboj & Arshiya Chaturvedi

Executive Summary

The India-EU relationship has followed a steadily positive trajectory in recent years, emerging as a key focal point in international diplomacy. The year 2025 marks a particular high point, with high-profile visits, landmark cooperation agreements, and most recently, on 17 September, the release of the New Strategic EU-India Agenda¹, underscoring the EU's strong commitment to deepening cooperation across political, economic, and strategic domains.

Yet, this partnership now also faces potential headwinds over India's energy trade with Russia, which has become a major point of contention. In her statement of 19 September, EU Vice President Kaja Kallas cautioned that India's continued purchase of Russian oil could hinder closer ties with the EU.² India, for its part, has pushed back, noting the EU's own ongoing trade with Russia and pointing out that other partners, including the United States - which has even imposed secondary tariffs on India - also continue such exchanges.³

This policy brief will outline different positions taken by the US, EU, and India regarding Russia's energy trade since the start of the conflict and the legitimacy of India's trade choices. It will also argue for the EU-India partnership to prioritise consensus-building through dialogue, mutual respect, and collaboration, recognising that each side comes from a different historical and developmental context. Rather than prescribing policies to one another, the partnership must allow space for differences while working towards shared goals.

EU-India Relations and Changing Global Dynamics

¹ High Representative of The Union for Foreign Affairs and Security Policy. "Joint Communication to the European Parliament and the Council on a New Strategic Eu-India Agenda." European Commission, September 17, 2025.

https://www.eeas.europa.eu/sites/default/files/2025/documents/JOIN_2025_50_1_EN_ACT_part1_v9.pdf.

² European External Action Service Press Team (EEAS). "College Readout: Press Remarks by High Representative/Vice-President Kaja Kallas on the New EU-India Strategic Partnership and on the Package of Proposals on Israel." European Union External Action, 2025. https://www.eeas.europa.eu/eeas/college-readout-press-remarks-high-representativevice-president-kaja-kallas-new-eu-india-strategic_en.

³ Ministry of External Affairs (MEA). "Statement by Official Spokesperson." Ministry of External Affairs, Government of India, August 4, 2025. <https://www.mea.gov.in/Speeches-Statements.htm?dtl/39936>.

The European Union and India have witnessed significant rapprochement, with aligning strategic interests and growing synergies in today's shifting geopolitical landscape. The high point of this relationship was the February 2025 visit of European Commission President Ursula von der Leyen, accompanied by the entire College of Commissioners, to Delhi. This was especially noteworthy as it marked the first-ever visit of the Commission President together with the full College to India, and indeed the first such visit outside Europe under the current Commission, underscoring the EU's prioritisation of India as a key partner within its strategic framework.⁴

The Joint Leaders' Statement that was issued at the conclusion of Commissioner von der Leyen's visit substantiated this further, outlining comprehensive bilateral cooperation in areas including trade, technology, digital and green innovation, defence, and supply chains, as well as extending development collaboration in third-party countries. Since then, the two sides have undertaken numerous initiatives to advance this redefined relationship, notably the fast-tracking of EU-India FTA negotiations and the signing of the EU-India Trilateral Cooperation Framework in June 2025.

More recently, on September 17, the EU released its New Strategic EU-India Agenda, which sets out five pillars of bilateral cooperation and provides a pragmatic action plan for the partnership. The five pillars are⁵:

1. Prosperity and Sustainability
2. Technology and Innovation
3. Security and Defence
4. Connectivity and Global Issues
5. Enablers Across Pillars

The strategy focuses on unlocking bilateral potential through streamlining trade (notably via the India-EU FTA), investment protection, and regulatory frameworks in digital, financial, and other domains. It also highlights active collaboration in

⁴ Ministry of External Affairs. "Leaders' Statement: Visit of Ms. Ursula von Der Leyen, President of the European Commission and EU College of Commissioners to India (February 27-28, 2025)." Ministry of External Affairs, Government of India, 2025. https://www.mea.gov.in/bilateral-documents.htm?dtl/39112/Leaders_Statement_Visit_of_Ms_Ursula_von_der_Leyen_President_of_the_European_Commission_and_EU_College_of_Commissioners_to_India_February_2728_2025.

⁵ Supra Note 1.

advanced manufacturing, green technologies, semiconductors, pharmaceuticals, biotechnology, the clean transition, and other sustainable development sectors.

To facilitate effective cooperation, the Agenda proposes measures such as creating “Blue Valleys” platforms for private sector engagement, bolstering research security, establishing EU-India Innovation Hubs, forging startup partnerships, and developing joint R&D in critical areas like High-Performance Computing, AI, nuclear energy, and 5G/6G. It further advocates sectoral dialogues in aviation, space, and foreign and security policy.

The Agenda also underscores the need for stronger EU-India engagement in the Eurasian, regional maritime, and Indo-Pacific security domains, through deeper naval cooperation, coordinated responses to hybrid threats, and expanded collaboration in defence technologies. While setting out EU-India cooperation in connectivity under IMEC, including the EU-Africa-India Digital Corridor and Green Shipping Corridors, it also calls for greater coordination on multilateral reform, transnational initiatives such as the International Solar Alliance, disaster resilience, humanitarian assistance, and global governance areas, including ocean management, AI, and arms control. The policy document also highlights skills mobility under the Enablers pillar, focusing on legal migration frameworks, educational exchanges, and business collaboration.

The EU has indicated its expectation that the Agenda will be formally adopted at the upcoming EU-India Summit (in early 2026), followed by efforts to implement its provisions for the effective realisation of the partnership. At the same time, recent developments linked to Russia’s war in Ukraine and energy trade present challenges that will need careful management to sustain the positive momentum in this renewed relationship.⁶

Russia, in recent months, has escalated its military actions in Ukraine to a historic high, employing extensive drone and missile strikes with significant impact on civilian and infrastructure targets.⁷ In September 2025, Russia has also violated NATO airspace, as Russian jet incursions were reported by many European countries, including Poland, Finland, Latvia, Lithuania, Norway, Romania, and Estonia.⁸ This has prompted the US and the EU to adopt more assertive policy measures to cut off Russia’s economic resources, seeking to weaken its ability to sustain the war. As energy exports make up

⁶ Supra Note 1.

⁷ Khalil, Hafsa. “Russia Launches Biggest Wave of Strikes on Ukraine for Weeks.” *BBC*, August 21, 2025. <https://www.bbc.com/news/articles/c62wj8yje2eo>. ; Rainsford, Sarah. “Russian Air Strikes Get Deadlier and Bigger, Hitting Ukraine’s Very Heart.” *BBC*, September 9, 2025. <https://www.bbc.com/news/articles/cgrqwpee05ro>.

⁸ NATO. “Statement by the North Atlantic Council on Recent Airspace Violations by Russia.” North Atlantic Treaty Organisation (NATO), 2025. https://www.nato.int/cps/en/natohq/official_texts_237721.htm.

a large share of Russia's economic output, the EU is now proposing tougher restrictions on Russia's energy sector to curtail its ability to fund war operations. The upcoming 19th sanctions package would close loopholes (for instance in LPG), aim to ban Russian LNG by 2027, and expand energy-related restrictions, even though many of these measures are still being negotiated and have yet to be fully enacted.⁹

These measures would not only impact Russia, but also countries like India that currently rely on Russian energy at relatively favourable prices. In her remarks accompanying the new Strategic EU-India Agenda, Kaja Kallas explicitly flagged the divergence in EU and Indian positions on Russia and energy as a point of concern, suggesting that unless these differences are addressed, they could limit the depth of future engagement.¹⁰

The US Approach to Russian Aggression

Under the Biden Administration, during which the Russia-Ukraine conflict began, the United States coordinated a targeted sanctions-based approach with its G7 allies and NATO partners against Russia. Many Russian financial institutions were sanctioned, including Gazprombank, individuals' accounts were frozen, and the energy sector was targeted with restrictions on its exports.¹¹ While there was no complete embargo on Russian energy, a USD 60 per barrel price cap on seaborne Russian crude was imposed by the G7, the EU, and Australia.¹² This price-cap mechanism was designed to limit Russia's revenue for war financing while avoiding disruptions to global oil supply and price stability. On this basis, the Biden Administration did not extend sanctions to countries such as India and China, which increased their purchases of Russian oil within the price-cap framework. Karen Donfried, then US Assistant Secretary of State for European and Eurasian Affairs, noted in a press briefing that the United States was not seeking to sanction India. Geoffrey R. Pyatt, then US Assistant Secretary of State for Energy Resources, further explained that the sanctions regime

⁹ Directorate-General for Communication. "Statement by President von Der Leyen on the 19th Package of Sanctions against Russia." European Commission, September 19, 2025.

https://ec.europa.eu/commission/presscorner/detail/en/statement_25_2138.

¹⁰ Supra Note 2.

¹¹ The White House. "FACT SHEET: United States Bans Imports of Russian Oil, Liquefied Natural Gas, and Coal | the White House." The White House, March 8, 2022. <https://bidenwhitehouse.archives.gov/briefing-room/statements-releases/2022/03/08/fact-sheet-united-states-bans-imports-of-russian-oil-liquefied-natural-gas-and-coal/>.

¹² Directorate-General for Communication. "Questions and Answers: G7 Agrees Oil Price Cap to Reduce Russia's Revenues, While Keeping Global Energy Markets Stable." European Commission, December 3, 2022. https://ec.europa.eu/commission/presscorner/detail/en/QANDA_22_7469.

did not require universal adherence to be effective and that Washington was comfortable with India's approach.¹³

However, incumbent US President Donald Trump has opted for a sharply contrasting approach from his predecessor. While the Trump Administration has maintained the sanctions on Russia put in place by the Biden Administration, it has not introduced any new restrictions. The Administration also declined to endorse the EU's proposal in July 2025 to lower the Russian oil price cap. Yet, somewhat paradoxically, it has now begun singling out India over Russian energy imports, demanding that India halt its purchases of Russian oil entirely. After New Delhi has refused to accede to this demand, the US imposed a secondary 25 per cent tariff on Indian goods as a punitive measure, effective August 27.¹⁴ This is on top of the existing 25 per cent tariff that the US has imposed on Indian imports dated July 31, which was a modification of the original executive order of April 2. Trump has argued that India's imports of Russian oil are fuelling the war and undermining US peace efforts. He has maintained that tariffs on India would compel it to halt trade with Russia, thereby inflicting serious economic costs on the Russian Federation and constraining its ongoing aggression. He has also urged European allies and other G7 countries to impose tariffs of 50% to 100% on China and India for their purchases of Russian oil.¹⁵ On September 13, he went further, demanding that NATO members cease buying Russian oil altogether before the US imposes additional tariffs.¹⁶

The EU's Strategic Response

Since the outbreak of the Russia-Ukraine conflict, the EU has been working with its international partners to systematically curtail Russia's war-fighting capacity. It has adopted successive sanctions packages against Russia, which comprise a wide range of restrictive economic and political measures, including targeting key Russian institutions, enterprises, and elites, limiting access to financial services and prohibiting the export of critical goods and technologies.¹⁷ While the major focus has been on undermining Russia's energy trade, the EU's significant energy dependence on Russia has made this somewhat challenging. This is why the EU adopted a phased approach

¹³ Bhaumik, Anirban, and DHNS. "US Makes U-Turn on India's Purchase of Oil from Russia." *Deccan Herald*, February 9, 2023. <https://www.deccanherald.com/india/us-makes-u-turn-on-indias-purchase-of-oil-from-russia-1189627.html>.

¹⁴ Raghavan, Sharad. "Trump Tariffs: U.S. Issues Draft Notice to Impose 50% Tariffs on Indian Products Effective August 27." *The Hindu*, August 26, 2025. <https://www.thehindu.com/news/international/us-draft-notice-to-implement-50-tariffs-on-india-from-august-27-donald-trump/article69977797.ece>.

¹⁵ Hoskins, Peter. "Trump Calls on EU to Impose 100% Tariff on China and India to Pressure Putin." *BBC*, September 10, 2025. <https://www.bbc.com/news/articles/c80gvz3l7n2o>.

¹⁶ Holland, Steve, and Gram Slaterry. "US to Give Ukraine Intelligence on Long-Range Energy Targets in Russia." *Reuters*, October 2, 2025. <https://www.reuters.com/world/europe/us-provide-ukraine-with-intelligence-missile-strikes-deep-inside-russia-wsj-2025-10-01/>.

¹⁷ European Council. "Timeline - EU Sanctions against Russia." European Union, 2024. <https://www.consilium.europa.eu/en/policies/sanctions-against-russia/timeline-sanctions-against-russia/>.

to banning Russian energy imports, allowing member states time to adjust and mitigate economic shocks. Russian coal was banned in April 2022, being the first banned energy commodity. This was a strategic choice, as the EU's green policy and Emissions Trading System (ETS) were already pushing for the phasing out of coal. The prohibition on the purchase, import, and transfer of seaborne crude oil and certain petroleum products from Russia began in December 2022, followed by a ban on other refined petroleum products in February 2023. However, certain EU countries received a temporary exemption and were allowed to import Russian crude oil via pipeline.¹⁸

Further, as Russian oil was not completely banned from the global market but was subjected to a price cap, its transshipment within the capped price to a third country was allowed in the EU. But in June 2024, under the 14th sanctions package, the EU banned reloading services for Russian liquefied natural gas (LNG) in its ports for transshipment to third countries.¹⁹ The EU also embargoed port access and restricted maritime services within its territory to an increasing number of ships, which have been listed as part of Russia's shadow fleet.²⁰

Meantime, Russian natural gas has not faced a full EU-wide ban. While pipeline imports have collapsed since 2022, imports of Russian LNG continued, and in some EU, countries even increased in the last financial year, keeping Russia among the EU's top LNG suppliers. However, with Russia's increasingly aggressive actions in Ukraine, breaches of NATO airspace, and Trump's demand that the EU take stronger measures, the EU has adopted a more extensive sanctions package on July 18, 2025. These measures included tightening enforcement of the \$60-per-barrel crude oil price cap by revising the calculation method, which effectively lowered the reference price for compliance checks; extending the ban on imports of refined petroleum products made from Russian crude oil, including those re-routed through third countries, with exemptions for trusted partners such as Canada, Norway, Switzerland, the United Kingdom, and the United States; and imposing a full transaction ban on entities connected to the Nord Stream 2 project. Other measures targeted Russia's so-called "shadow fleet" of oil tankers, listed additional individuals and entities under sanctions, and tightened restrictions on financial services, technology exports, and

¹⁸ European Parliamentary Research Service. "AT a GLANCE Plenary -March 2025." European Parliament-European Union, March 2025.

[https://www.europarl.europa.eu/RegData/etudes/ATAG/2025/769515/EPRS_ATA\(2025\)769515_EN.pdf](https://www.europarl.europa.eu/RegData/etudes/ATAG/2025/769515/EPRS_ATA(2025)769515_EN.pdf).

¹⁹ Ibid.

²⁰ Supra Note 17.

other goods to Russia.²¹ The package also mandated imposing sanctions on Rosneft-owned Indian oil refinery, Nayara Energy Ltd, with a 49.13% stake held by Rosneft.²²

On September 19, Commission President Ursula von der Leyen announced a new package of proposed sanctions against Russia, which are to be adopted by the Council as the 19th sanctions package. These include a ban on Russian liquefied natural gas imports from January 1, 2027, ahead of the initially planned date of January 1, 2028, a full transaction embargo on Russian oil companies, Rosneft and Gazpromneft, and penalties on refineries, oil traders and petrochemical companies in third countries that violate sanctions.²³

The Indian Perspective

As the world's most populous country and one of the fastest-growing major economies with a recorded growth rate of 6.5% in FY 2024-25, India faces a growing demand for energy. To meet this demand, it is heavily dependent on fossil fuels, which account for about 75% of its energy supply.²⁴ While over the past decade or so, India has been actively directing its efforts towards diversifying the energy mix through increased investments in the renewable energy sector, especially in solar and wind power, a full or significant phase-out is not on the cards and will only unfold gradually.

According to International Energy Agency (IEA) projections, India will become the largest source of global oil demand growth by the end of this decade; its natural gas demand is also projected to rise by 60% by 2030.²⁵ The organisation has also estimated that India's electricity demand is expected to grow at an average annual rate of 6.3% between 2025 and 2027.²⁶ With such high energy requirements and relatively limited domestic production, especially of oil, India imports about 40-41%²⁷ of its primary energy and nearly 85% of its crude oil. This makes the cost of energy a critical consideration for the economic security and developmental interests of India.

²¹ Directorate-General for Communication. "EU Adopts 18th Package of Sanctions against Russia." European Commission, 2025. https://ec.europa.eu/commission/presscorner/detail/en/ip_25_1840.

²² Dutta, Sanjay. "India Cries Foul as EU Curbs on Russia Hit Gujarat Refinery." The Times of India, July 18, 2025. <https://timesofindia.indiatimes.com/india/india-cries-foul-as-eu-curbs-on-russia-hit-gujarat-refinery/articleshow/122774028.cms>.

²³ Supra Note 9.

²⁴ IEA. "India - Countries & Regions." International Energy Agency (IEA), n.d. <https://www.iea.org/countries/india/energy-mix>.

²⁵ IEA. "India's Natural Gas Demand Set for 60% Rise by 2030, Supported by Upcoming Global LNG Supply Wave - News - IEA." International Energy Agency (IEA), February 12, 2025. <https://www.iea.org/news/indias-natural-gas-demand-set-for-60-rise-by-2030-supported-by-upcoming-global-lng-supply-wave>.

²⁶ IEA. "Demand - Electricity 2025 - Analysis - IEA." International Energy Agency (IEA), 2025. <https://www.iea.org/reports/electricity-2025/demand>.

²⁷ Supra Note 24.

India's trade with Russia has increased significantly since the start of the Russia-Ukraine war, rising from US\$10 billion pre-2022 to US\$ 69 billion in FY 2024-25, with Russian oil accounting for the largest share of this growth.²⁸ As per CREA data, India's total purchase of Russian fossil fuels from early 2022 to March 2025 was EUR 205.84 billion, of which EUR 112.5 billion (USD 121.59 billion) was for crude oil and EUR 13.25 billion for coal.²⁹ This has drawn sharp criticism from the US and the EU in recent months. India has repeatedly clarified that its decision to import Russian oil is based on market-economic factors and geopolitical realities. There are no international sanctions on Russian oil, only unilateral coercive measures announced by Western nations. After the EU and G7 introduced an embargo and price caps on Russian oil in 2022, the Urals benchmark for Russian crude has consistently traded well below Brent, the global benchmark used by most countries, including those in the Middle East. This has made Russian oil imports significantly cheaper than India's top traditional suppliers from the Middle East, many of whom are known to charge premium prices. Moreover, the US-imposed sanctions on Iran in 2019, a key traditional oil supplier to India, have already forced India to diversify its supply sources to avoid secondary US sanctions.

On August 4, 2025³⁰, the Ministry of External Affairs (MEA) issued a sharp rebuttal to Western criticism of India's Russian oil trade, terming this as an example of "double standards." The statement argued that when traditional oil supplies were rerouted to Europe after the Russia-Ukraine war, India had no choice but to act in its national interest to secure stable and affordable energy for its citizens. It pointed out that the U.S. and EU continue to engage in significant trade with Russia in critical sectors, while singling out India's oil imports for condemnation. In response to U.S. accusations of profiteering from Russian oil, India countered that the U.S. - which professes support for free markets - was hypocritical in blocking India's own strategic decisions over energy. The statement also noted that while India was slapped with a 25% tariff over Russian oil, no analogous measures had been taken against China (Russia's biggest buyer), Turkey (a NATO member), or EU states that persist in importing Russian energy. Most recently, Indian officials have made clear that any meaningful cut in Russian oil imports by Indian refiners would depend on

²⁸ Embassy of India, Moscow. "Embassy of India, Moscow (Russia)." indianembassy-moscow.gov.in, 2025. <https://indianembassy-moscow.gov.in/overview.php>.

²⁹ PTI. "India Bought Rs 1.5 Lakh Crore Worth of Russian Oil since Ukraine War." The Economic Times. Economic Times, March 6, 2025. https://economictimes.indiatimes.com/industry/energy/oil-gas/india-bought-rs-1-5-lakh-crore-worth-of-russian-oil-since-ukraine-war/articleshow/118757763.cms?utm_source=contentofinterest&utm_medium=text&utm_campaign=cppst.

³⁰ Supra Note 3.

Washington lifting sanctions on Iranian and Venezuelan crude - sources of supply that are currently blocked.³¹

EU-India Relations: Way Forward

The singling out of India by the U.S. and the EU over its Russian crude oil imports is neither well-founded nor even-handed, particularly when many other countries - including the U.S. and EU themselves - continue to trade with Russia in pursuit of their own national interests. The EU-India relationship, as acknowledged by both sides, has acquired critical significance in today's geopolitical landscape. Its importance lies not only in advancing their respective development and security, anchored in strategic complementarities, but also in shaping the wider international order. Both partners profess a commitment to shared values such as multilateralism and a rules-based international system, even as these very principles come under strain.

Going forward, the credibility and effectiveness of this partnership must rest on fairness, balance, and mutual respect, and mutual interest, rather than on one side seeking to impose its priorities on the other. India's External Affairs Minister underscored this in his address to the 80th session of the United Nations General Assembly in September 2025, noting that "we all have different histories, traditions, heritages, and cultures; for us to coexist and benefit from one another, it is necessary that we foster mutual understanding and respect."³²

Both India and the EU have domestic imperatives, strategic interests, and development priorities that warrant equal recognition. Just as the EU exercised its autonomy in managing its response to Russian energy dependency - diversifying supplies at a pace consistent with its own capacities - India, as a sovereign nation, is equally entitled to frame its energy strategy in accordance with its national interests and long-term priorities.

What is needed now is not contention but pragmatic policy dialogue, constructive negotiation, and genuine collaboration to build consensus or design viable alternatives. India is fully cognisant of the vulnerabilities that come with energy over-

³¹ Desk, TOI Business. "Reducing Russian Crude Imports: India Wants US to Allow Oil from Iran, Venezuela; 25% Penal Tariffs in Focus." The Times of India (TOI), September 26, 2025.

https://timesofindia.indiatimes.com/business/india-business/reducing-russian-crude-imports-india-wants-us-to-allow-oil-from-iran-venezuela-25-penal-tariffs-in-focus/articleshow/124143600.cms?utm_source=contentofinterest&utm_medium=text&utm_campaign=cppst.

³² Ministry of External Affairs (MEA). "EAM's Statement at the General Debate of the 80th Session of the UNGA." Ministry of External Affairs, Government of India, September 27, 2025. <https://www.mea.gov.in/Speeches-Statements.htm?dtl/40170/EAMs+statement+at+the+General+Debate+of+the+80th+session+of+the+UNGA+September+27+2025>.

dependence. Guided by this awareness, and in line with its Paris Agreement commitments, it has been steadily working to transition from fossil fuels towards clean and renewable energy. The EU, with its advanced expertise and resources, could play a catalytic role in this endeavour - through technology transfer, investment, and joint initiatives - thereby making the partnership more future-oriented and mutually reinforcing.

Conclusion

Recognising their respective strategic strengths and complementarities, India and the EU have, in recent years, made serious efforts to advance their relationship into a vital, mutually beneficial, and future-oriented partnership. The Joint Communication to the European Parliament and Council dated September 17, 2025 is unequivocal that in an increasingly complex geopolitical and geoeconomic environment, closer EU-India cooperation is more important than ever. However, a successful partnership is not built only on strategic complementarities or convergences, but also on the ability to accommodate differences, embrace diversity, and respect varying capacities. The issue around India's trade of Russian oil is one such divergence in an otherwise robust relationship. This divergence, however, can serve as a reference point for building a partnership grounded in mutual respect and reciprocity. For the relationship to mature, India and the EU must acknowledge each other's strategic interests and constraints, and place a premium on negotiation and collaboration rather than unilateral pressure. Such an approach would not only safeguard sovereignty and strategic independence but also strengthen cooperation on areas of shared interest, turning points of difference into opportunities for even deeper convergence.



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