



# Delhi Policy Group

Advancing India's Rise as a Leading Power

## POLICY BRIEF

# Global Order, the US and India

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Delhi Policy Group

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### Cover Images:

US President Donald J. Trump delivering a year-end address to the nation, at the White House, on December 18, 2025. Source: [White House](#)

US President Donald J. Trump hosted Indian Prime Minister Narendra Modi at the White House, on February 13, 2025. Source: [White House](#)

Indian Prime Minister Narendra Modi hosted the President of Russia, Vladimir Putin at Hyderabad House, for the 23rd India-Russia Annual Summit, on December 05, 2025. Source: [Prime Minister of India](#)

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# **Global Order, the US and India**

by

Hemant Krishan Singh

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## Global Order, the US and India

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### I. Global Order

2025 was a roller-coaster year of global tumult and disruption, leaving in its wake deepening uncertainty on where the world is headed. The centrepiece was radical change in how America deals with the world, jettisoning long standing patterns of its post-Cold War policies to assert raw power, setting aside established canons of diplomatic practice, and demanding global acquiescence to derive unilateral advantage, even while forgoing responsibility for sustaining a world order of the US's own making.

The future is always difficult to predict, but neither the US nor the world appeared to be headed in a better direction in the wake of the Trump revolution.

Change in the US will beget change in the world, which in the long term may not be to its advantage, as nations hedge and adjust to preserve their interests, and adversarial spheres of influence emerge where US power recedes. Already ongoing transformations in the international space will accelerate, relationships will diversify, new understandings will be forged, and unilateral impositions of suppression will eventually foster greater strategic autonomy and multipolarity.

The comity of nations is now confronted with three apex powers: one wielding revanchist aggression, the other resorting to expansionist assertion, and the third relying on belligerent unilateralism. The US is no longer a benign great power, upholding a liberal international order and standing distinctly apart from authoritarian powers. Europe, then Asia, saw the US turning away from a posture of relative reassurance for allies towards give-and-take bargaining with Russia and China. Europe's shock was also a warning to Asia.

Whatever the misplaced expectations of the Trump administration, it is unlikely that a diverse world community of sovereign nations will redirect national energies towards 'making America great again'.

There is no question that the US is the pre-eminent global superpower, with immense capability to deploy that power for purposes it decides are in its best interest. Ultimately, it is the manner in which this power is exercised that will determine whether the US can earn the world's respect, and the wider influence that flows from it.

With no boundaries apparently set for what the US may do next, respect and regard for it across continents, particularly among allies and partners, dissipated significantly during the course of the past year.

## **II. United States**

US President Donald J. Trump was the unquestioned, omnipresent and unrelenting global protagonist of the year, stamping his complete supremacy over the US domestic scene with his super-empowered presidency and playing the global chessboard in unprecedented ways, leaving traditional US foreign policy elites stunned and largely sidelined. He was the sole decision maker and determinant of what "America First" means. His worldview became the new normal, wielding unpredictability as leverage, prioritising transactional dealmaking, displaying casual indifference towards allies and partners, and making accommodating overtures towards (adversarial) great powers.

President Trump's forceful assertion of US power was shorn of principle, ideology or values which have long been associated with American statecraft (even though these have often been ignored in actual practice). US foreign policy became more erratic, transient and volatile, linked directly like never before to the personality, preferences and predilections of the President.

There was an avowed desire for global peace and stability, but the approach towards securing that goal was mostly performative, resulting in a patchwork of high-profile pronouncements of peace deals without settling any of the underlying factors driving various conflicts, which continued to simmer. The grinding war of attrition in Europe raged on.

The US may never be the same again, as priorities of Trump's rampaging MAGA base outlast his presidency, and a narrow, nativist-sectarian view of "heritage" Americans is mainstreamed.

As the year drew to a close, the changes heralded by President Trump over the course of several months were presented in a new US National Security Strategy (NSS) that underscored a more narrowly focused foreign policy based on a graded hierarchy of core national interests. It stood out in sharp contrast with the first Trump administration's NSS, which had made great power competition its central theme.

The US NSS is traditionally regarded as an all-encompassing wish-list emerging from a bureaucratic inter-agency process, which is not necessarily translated into practice. The Trump NSS is different. It declares up front that it is all about defining the direction of US foreign policy and the manner in which the US wishes to engage the world. It presents a substantive, prioritised agenda for action that is well aligned with the views of Trump's MAGA support base. And it explains what the Trump administration has already been doing, as well as the trends that may drive US policies over the next three, and possibly seven, years.

This new NSS announced an end to an era where the US sought permanent domination of the entire world based on a willingness to shoulder "forever burdens"; highlighted the centrality of the nation state, national sovereignty and national interests; criticised international institutions (UN) and transnational organisations (EU); espoused a desire to seek good relations with all nations without imposing on them democratic or social change, while also being respectful of other countries' differing religions, cultures and governing systems; committed the US to maintaining global and regional balances of power and preventing any nation from becoming so dominant that it could threaten US interests; pressed US allies and partners to assume primary responsibility for their regions and contribute more to collective defence to retain US favour and merit support; and affirmed that the US would bring together its enormous national assets to strengthen American power and pre-eminence in the world.

Significantly, the NSS downplayed great power competition, making only generalised and indirect references to security risks necessitating military deterrence. In contrast, the role of economic security was a recurrent theme, with the US proposing to consolidate its alliance system into an economic grouping in order to rebalance commercial and economic relations (with China) and counter predatory economic practices. At the same time, it left open room

for “genuinely mutually advantageous economic relations” with China, and trade interdependence based on “non-sensitive” factors. The NSS also made it clear that going forward, the US will continue to leverage market access and economic power to impose unilaterally framed obligations and achieve strategic goals.

The immediate impact of this US resort to varying degrees of economic coercion and “reciprocal tariffs” was less on mercantilist China, and more on US allies and partners dependent on US power to shore up their security interests, in Europe and Asia alike. The European Union threw in the towel without resistance, seeking to retain US support over the Ukraine conflict. Japan and South Korea were not far behind, given their vulnerability to China. Even emerging Asian powers like Indonesia and Malaysia found comfort in trade deals with the US which undermined their sovereign rights to determine economic policies as independent nations.

In terms of regional theatres, the US NSS lifted the Western Hemisphere to the top priority, with the focus on homeland defence, pliant governments and expulsion of hostile powers. This was more a reflection of domestic MAGA compulsions than a realistic assessment of the most serious strategic challenges confronting the US.

The Indo-Pacific came next as the key economic and geopolitical battleground of the next century, but with the focus more sharply aimed at the interests of the US economy, security of supply chains and access to critical minerals. Denying aggression in the First Island Chain found mention, with pressure on Japan and South Korea to deliver more; the terminology used for defending the cross-Taiwan Strait status quo was milder than in previous iterations of the NSS. In terms of strategic competition, the US-China equation was left deliberately undefined, creating policy dilemmas for the nations of Asia and the Indo-Pacific as expectations of a US security umbrella receded.

Europe was listed as the third priority, with outright denunciations of the “transnational” European Union, support for far-right parties and the positioning of the US as a mediator re-establishing conditions of stability within Europe and strategic stability with Russia. The US committed itself to “preventing the reality of NATO as a perpetually expanding alliance”. These harsh injunctions against Europe were unprecedented, even while the US

pledged to restore “Europe’s civilisational self-confidence and Western identity”. There is now less strategic cohesion across the Trans-Atlantic alliance, while the civilisational connection between the two sides of the ‘Collective West’ remains intact in the MAGA mindset.

A non-prescriptive approach to the Middle East’s monarchies, a region which the US now sees as largely pacified and under its control, was highlighted by the NSS. Under US license, Israel emerged as the region’s dominant military power. However, deeper power struggles among regional players persisted.

Africa was largely brushed aside in the NSS, with a passing reference to its mineral resources and economic opportunity.

If this overall scenario is juxtaposed against the foreign policy initiatives pursued by the Trump administration during the course of 2025, the pattern becomes clear, along with the signal that it is here to stay. The US appears to be recognising the centrality of three great powers - US, Russia, China - and prioritising the management of power equations between them at both ends of the Eurasian landmass in a manner that advantages the US. That desired outcome will be difficult to achieve.

The contradictions in the US NSS are many, but some elements stand out: retaining “unrivalled soft power” after burning bridges with vast swathes of world opinion; upholding US national sovereignty and interests while ignoring those of other states; insisting that the US must always be treated “fairly” while no such prerogative applies to other nations who must give in to US demands; pronouncing a preference for peace and stability while disrupting the post WW II US-led world order that has underwritten stability for 80 years; and replacing the goal of global domination with balance of power equations based on “flexible realism”, which opens the door to adversaries.

It remains to be seen whether, and for how long, the world at large is willing to work with the US on Trump’s terms: contribute more to US benefit, align more with US priorities, expect less from the US in return, and learn to live with the unpredictability of the new US diplomatic playbook.

Of immediate concern to India will be indications that US-China relations seem to be entering a phase of structured high-level engagement, marked by both a tactical stabilisation of relations and a transactional truce on trade. There is at

present little sign of a durable, bipartisan consensus in the US on meeting China's long-term challenge. This also comes at a time when US reliance on the collective economic leverage of allies and partners, and on the traditional diplomatic tools of its influence, has eroded.

India finds brief, matter-of-fact mention in the NSS, seemingly falling in an undetermined category between the great powers and close US allies. The US intention to seek commercial and security ties with India, as also suggestions of a broader role for India in securing certain US interests, is indicated. Reference in this context is made to the Quad.

### III. India

That brings us to the least predicted, and most enigmatic, development of the year in terms of US foreign policy: a sudden and public estrangement with India. Neither the US nor India have better options than each other to shore up their respective interests in an uncertain world, so it remains a mystery what the US expects to gain from undervaluing India and imposing what are in effect punitive sanctions.

A vibrant, democratic, increasingly powerful and self-confident civilisational state like India cannot be subordinated or suppressed. This did not happen even when India was a much weaker nation in the era of non-alignment. India's continuing economic rise and emergence as a responsible power would certainly gain from what has been an expanding strategic partnership with the US, but equally its future cannot be held back by overt US hostility.

The year began promisingly with what was seen as a highly successful summit meeting between President Trump and PM Modi, and the fast-tracked negotiations of a trade deal which was virtually completed by the spring, before the wheels apparently came off in April-May for reasons which have been speculated about but never quite explained. Perhaps, in the MAGA universe, India does not matter strategically and can be sacrificed to secure other objectives perceived to be more important. In the midst of various rationalisations, there were also suggestions that bilateral ties are now held hostage to personalised petulance and animus.

India on its part was justifiably upset with Trump's expansive and unceasing claims of peacemaking in the short India-Pak conflict. But India was also slow

to understand the role of opaque deal-making, to which several countries readily resorted in order to secure favourable outcomes.

As a result, India in effect ended up as the only major country left standing up against Trump's one-sided transactionalism, and paying the price.

We were reassuringly told during the course of the year that official contacts and engagements between the US and India at various levels were normal and continuing, but at year end there was still no sign of the US relenting on the extraordinary and punitive tariffs imposed on India, ostensibly (not convincingly) in the context of Russia's war on Ukraine. When this impasse will end is apparently known only to President Trump himself. The Quad summit to be hosted by India can happen only when the pathway is cleared.

The upshot is that India-US relations are once again at an inflection point. There has been a severe setback to mutual trust, confidence has been shaken, uncertainty has grown, public support in India has plummeted, and there is considerable risk of backsliding. The fabled bipartisan consensus in Washington D.C. supporting bilateral ties has seemingly lost its voice; the much-indulged Indian diaspora, which provides the social and economic glue, has gone silent, obviously for self-preservation.

What has grown into a mutually reinforcing partnership of much promise since the dawn of this century could now be headed for a lose-lose rupture. For several decades of its post-independence era, India has been under the shadow of US sanctions, and so it remains once again.

It must be highlighted here that India has handled the situation with maturity and strategic restraint, leaving the door open for a return to the prior trajectory of ties, albeit with diminished trust. But it has also, politely and firmly, put the record straight on certain misleading assertions by President Trump and his administration's resort to "aggressive economic leverage" against India. From India's perspective, even more baffling are the enthusiastic US overtures to Pakistan, which are all the more difficult to explain in the light of that country's established track record.

India is a close partner of the US, not a treaty ally. But as the India-US partnership has grown over the past two decades, so has the expectation that the US will avoid taking steps that directly undermine India's national security

and economic prospects. Today, the US administration appears to be acting adversarially on both. On the flip side, the US NSS also no longer sees India as a strategic partner and counterweight to China.

This conjuncture is a stark warning to India about the perils of dependence and the expectation of predictability in its external relations, not least with the US. The way forward is also clear: India must not limit its strategic space to align solely with US interests, nor allow itself to be used as a pawn to serve US interests. There is no question that trust, reliability, stability and mutual interest are essential for any relationship to move forward. The onus now rests with the Trump administration.

In recent years, India has increasingly realised that it is facing the challenge of breaking through as a major power amidst rampant geopolitical competition and growing economic fragmentation. This trend only got worse in 2025. Trade or economic over-dependence, whether in relation to China or the US, is a strategic risk for India that must be mitigated. Diversification of options and partners is a necessity.

As India continues to draw valuable lessons from the prevailing dissonance in its relations with the US, it must assert even greater strategic independence, strengthen multi-alignment, and accelerate all-of-nation efforts to build national capacity and comprehensive power. It must also focus more on the Indo-Pacific, Europe and the Global South.

That is in fact the policy direction on which India is already embarked at the end of 2025, as increasingly signalled by recent developments and pronouncements.

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