



Delhi Policy Group

Advancing India's Rise as a Leading Power



GLOBAL HORIZONS

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Cover Images:

Indian Prime Minister Narendra Modi, in a group family photograph along with global world leaders at the Opening Ceremony of India AI Impact Summit 2026 at Bharat Mandapam, in New Delhi on February 19, 2026.

Source: [Prime Minister of India](#)

Indian Lok Sabha Speaker Om Birla on Tuesday met Bangladesh's newly sworn-in prime minister Tarique Rahman and handed over a personal congratulatory letter by Indian Prime Minister Narendra Modi, on February 17, 2026. Source: [X/@ombirlakota](#)

Modi held talks with President of Seychelles, Dr. Patrick Herminie at Hyderabad House, on February 9, 2026.

Source: [Narendra Modi](#)

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by

Nalin Surie

The contempt with which the present US administration looks upon the multilateral system based on the United Nations charter and international law was vividly on display when the United States and Israel attacked Iran by air and missiles on February 28, 2025, with a view to bringing about regime change in that country by killing Ayatollah Khamenei and his closest circle of senior advisors. The ostensible reason, an obvious deception, was to prevent Iran from acquiring nuclear weapons and expanding its missile capabilities. Deception because negotiations with Iran were ongoing in which significant progress was reported to have been made on the eve of the attacks.

It bears recalling that before unleashing the wars in Iraq and Afghanistan, the then US administrations had gone through the UN route. But for the present Trump administration, might is right is the only criterion that matters, especially since Russia remains deeply mired in its Ukraine misadventure and dependent on US goodwill to find a face saving exit from Ukraine. And, China's helplessness is palpable notwithstanding its pretensions of being a great power. There is no automatic direct relationship between the size of GDP and the ability to project military power to defend one's interests. The Europeans are no doubt unhappy but given their own military inadequacy in the context of the ongoing war in Ukraine, are in no position at this stage to rein in the US.

Nations in the Global South are hardly surprised. They have regularly seen these scenarios unfold before them before.

The US and Israeli operation is ongoing at the time of writing. Iran has in retaliation attacked targets not only in Israel but also in UAE, Bahrain, Saudi Arabia, Kuwait, Qatar and Oman. Attacking Israeli and US targets is understandable, but attacking targets in the Gulf countries and that too civilian targets was a strategic mistake. These countries were not part of the attacks on Iran, but now have no option but to defend themselves. This will poison the relations of the Gulf countries with Iran, which had been on the mend, going forward.

The Gulf is simply too important a global transportation, business, finance, energy, connectivity and international diaspora hub and its disruption will also seriously vitiate international sympathy for Iran.

India is seriously impacted on several fronts, and will work with its Gulf partners to safeguard its diaspora, energy, trade and other interests.

Till the election of a new supreme religious leader in Iran, a three man Interim Leadership Council was established on March 01 comprising the President, the Chief Justice of the Supreme Court and Ayatollah Alireza Arafai, a member of the Guardian Council.

The US appears to have made it clear that they will not put boots on the ground, but has not entirely ruled that out either. The Iranian people are expected to bring about regime change by fighting the new, weakened, clerical rulers who are sustained by the IRGC and other police/security forces. The son of the former deposed Shah of Iran is implicitly being proposed by the US to lead a new Iranian regime.

The US game plan is clear: re-establish control over the entire Gulf region and its energy resources, including those of Iran, while ensuring security for Israel. The Palestine issue is for the US a side show at best.

Whether these objectives will be achieved will depend, among other factors, on how and when the US-Israel war against Iran ends. Iranian attacks against the Gulf states will deepen their mistrust of Iran, especially if the clerical regime there survives. It will be a long haul.

President Trump had repeatedly warned Iran that he would not tolerate Iran acquiring nuclear weapons and growing its missile capabilities. Iran had clearly denied that it had any intention to acquire nuclear weapons. Iran had also been warned that the US would not tolerate the Iranian regime's killings of its citizens. But that has not dampened the view held by many that the action against Iran was to draw attention away both from the revelations from the Epstein files and the decision of the US Supreme Court on February 20 striking down President Trump's unilateral imposition of punitive tariffs on US trade partners under the IEEPA. Speculation aside, the objectives and broader strategic importance of the approach followed by the Trump administration in the Middle East cannot be brushed aside.

During the month, the Munich Security Conference, held on February 13-15, provided an opportunity in particular for Western allies to once again soul search regarding the state of the alliance, following the shocks inflicted on it by the Trump administration, including at the same conference a year ago. This year was no better. The main US exposition was by Secretary of State Marco Rubio. His tone was gentle but the message as hard as that delivered by Vice President Vance last year. In fact, arguably even harder. Rubio focused on the need to get back to Christian values that, inter-alia, had allowed the West to dominate the world in the past and to do so again. There was no pressure on Russia over Ukraine.

The depth of European angst at the state of the alliance was clearly reflected in the documentation prepared by the MSC Secretariat for the conference. It was argued there that the world had entered a period of “wrecking ball politics” where sweeping destruction rather than careful reforms and policy corrections was the order of the day. “As a result, more than 80 years after construction began, the US-led post 1945 international order is now under destruction” and “the most powerful of those that take the axe to existing rules and institutions is US President Donald Trump”. The fear was expressed that the outcome of these policies might see a world shaped by transactional deals rather than principled cooperation, private rather than public interests, and regions shaped by regional hegemony rather than universal norms. In sum, a world that privileges the rich and powerful.

According to the MSC Secretariat report, the impact of US policies has heightened the Europeans’ sense of insecurity; in the Indo-Pacific, an even more powerful China is making a forceful bid for regional dominance with provocations and coercion that threaten regional stability. Also in the Indo-Pacific, doubts have grown about US security guarantees and strategic interests in the region.

On the trade front, since Trump returned to office, the US has openly dispensed with the rules of global trade while China has continued its market-distorting practices and escalated its weaponisation of economic chokepoints. Further, US policies have pushed the already strained development and humanitarian system into an existential crisis. It may be recalled here that the Trump administration has rejected the UN’s SDGs.

The challenges notwithstanding, the MSC report suggested that many important actors are still invested in a rules based order and are trying to contain the effects of wrecking ball politics and probing new approaches that do not depend on Washington’s lead.

In effect, no punches were pulled by the conference organisers in setting the stage for the participants. The deep seated disenchantment with the policies of the Trump administration was palpable during the conference. The German Chancellor put it politely when he said at the conference that the rules based international order, “no longer exists in that form”; that Europe must not be complacent and must strengthen its political cohesion, industrial base and military readiness. He also paid lip service when he spoke of NATO centrality, but with Europe becoming a more capable and credible actor within it. Even more significant was the call by EU Commission President Ursula von der Leyen to operationalise article 42(7) of the EU Treaty, the EU’s mutual defence clause, which commits EU member states to provide aid and assistance if another member is attacked.

The challenge before Europe is to urgently convert plans based on the new reality into time bound projects and essentially take charge of its own security. This will probably require a core group of countries (e.g., France, Germany, UK, Italy and Poland) to take it forward, and this has begun to happen. The outcome of the war in Ukraine will be an important element in determining a new security order in Europe and the Europeans will need to ensure they are an integral and equal part of any new arrangement on Ukraine. This will not be easy.

The war in Ukraine continued, with Russia indiscriminately attacking energy infrastructure and civilian targets during the height of the harsh winter. At the same time, negotiations were held by the United States with both countries with a view to finding an acceptable via media for a ceasefire and perhaps a more lasting settlement. Reports suggest that some progress has been made but on the core issues, including territory and future security of Ukraine, there is still lack of agreement. In the meantime, casualties continued to mount on both sides. The onus for assisting Ukraine has been clearly shifted by the United States onto Europe which has scrambled to meet that challenge. Support for Ukraine in the European Council remains steady. The challenge before Europe is to ensure that they do not remain mere spectators while a deal is done over their heads by the US with Russia, and which places the burden of implementation on Europe.

The US-led war on Iran may delay progress on finding a deal on Ukraine.

Meanwhile, the ceasefire in Gaza held but with Israel intervening militarily whenever it wanted, ostensibly to suppress Hamas. Steps to enable further consolidation and expansion of Israeli settlements in the West Bank also continued. In this context, it is also pertinent that the first meeting of the so called Board of Peace set up by President Trump and endorsed by the UN Security Council in

January 2026 was held on February 19. It was chaired by President Trump. India attended as an Observer at the official level, along with 21 other countries.

The following decisions were reportedly taken:

1. The Board officially designated the Gaza Strip as the first 'Special Economic Peace Zone' allowing the BoP to implement its own regulatory framework bypassing local Palestinian and Israeli Civil Laws;
2. A development plan for Gaza was passed with a three-year timeline. This plan is structured as a series of Public-Private Partnerships where donor nations and private developers share the equity in new infrastructure, such as the proposed Gaza deep-water port. The total commitments reached \$17 billion, with the US pledging \$10 billion while nine other nations (Saudi Arabia, UAE, Qatar, Kazakhstan, Azerbaijan, Uzbekistan, Morocco, Kuwait and Bahrain) pledged a combined \$7 billion; and
3. There will be an International Stabilization Force (ISF) consisting of 20,000 soldiers tasked with disarming Hamas and other militants. Five countries - Albania, Indonesia (8,000 soldiers and deputy force commander), Kazakhstan, Kosovo, and Morocco - committed troops to the force which would report directly to the Board's High Representative rather than a UN command. The force will be tasked with "aggressive neutrality" - authorized to use force against any non-state actors attempting to disrupt reconstruction.

Egypt and Jordan have reportedly agreed to train the police force, which will be composed of 5,000 Palestinian police officers.

Ironically, the UNSC has itself enabled the setting up of an organisation that will undercut the core functions of the United Nations!

Following the capture of President Maduro of Venezuela by the United States, US pressure on Cuba was enhanced on account of the inability of Cuba to continue to receive low cost oil from Venezuela. Media reports suggested that the economic situation in Cuba is getting more difficult. US plans to facilitate regime change in that country are perhaps being put in place.

President Trump received a serious setback when the US Supreme Court announced on February 20 its decision to strike down the tariff actions taken by the President under the IEEPA since he came into power last year. The President's reaction was swift and harsh. He denounced the Supreme Court judges who voted

in favour of the decision and also announced alternative plans, permitted under a different law (but requiring Congressional approval after 150 days) to restore the use of tariffs as an instrument of extracting concessions from US trade partners. He also warned the latter of trying to use the judgement to back out of commitments on enhanced tariffs and investments etc. already made. Irrespective, the Supreme Court decision reflected a necessary rebalancing of the power distribution between the Executive, Congress and the Judiciary in the US. And, the administration will have to address all the demands from US importers for IEEPA tariff refunds amounting to some USD 134 billion. Adjustments will also have to be made to trade/tariff agreements already negotiated.

The efforts by members of the Western alliance to reduce dependencies on the US continued. These were reflected for instance in visits by the German Chancellor to China, and the French President and Canadian PM to India. The visit of President Lula of Brazil to India could be similarly categorised, although it held other significance too. On the other hand, the election of Japanese PM Takaichi and the huge majority she secured for her LDP in snap elections to the lower house of the Diet held on February 08 could be assessed as a plus from the perspective of President Trump.

The expiration of the New START Treaty on February 05 marked a watershed in the era of nuclear arms control. As of that day, there is no nuclear arms control agreement in place, and that can portend uncertainty and danger especially in an era where China and the DPRK are expanding their nuclear and missile arsenals, the US modernising its own and Russia not willing to get left behind. Besides, as the reliability of US security guarantees becomes less than robust, its allies may look for independent options, and Europe will need to increasingly contend with the Russian arsenal. These dangers need to be addressed early if a dangerous and potentially very destructive nuclear and missile arms race is to be avoided. Regrettably, the omens for that happening in the near future are not particularly bright. India cannot remain immune from that danger, as also developments in its neighbourhood, and will have to plan accordingly.

During February 2026, political developments in the Sudan conflict focused on a fresh international peace initiative led by an involved "Quad" comprising the US, Saudi Arabia, Egypt and UAE. There were also changes in United Nations' mediation efforts and greater diplomatic pressure at the UN Security Council.

The latest Quad framework has five main parts: an immediate ceasefire, unhindered humanitarian access, civilian protection, the launch of a political

process leading to civilian governance, and a reconstruction pathway supported by a pledged US\$1.5 billion.

While preliminary approval was obtained from both the Sudanese Armed Forces (SAF) and the Rapid Support Forces (RSF), SAF commander Abdel Fattah al-Burhan within hours of the announcement publicly rejected any role for the RSF, opposing provisions that would allow the RSF to retain local governance.

The prospects for de-escalation in Sudan remain bleak. The SAF refuses to grant political legitimacy to the RSF, which it continues to view as a rogue paramilitary force. Equally problematic is the absence of any meaningful preparation for withdrawals or disengagement. February 2026 witnessed intensifying clashes and the opening of new fronts, suggesting that both SAF and RSF are pursuing battlefield gains to strengthen their bargaining power. This dynamic directly undermines the sequencing of the Quad's plan, which presupposes a humanitarian ceasefire as a first step. Reports indicated that mass killings have not abated in recent weeks. This persistence of large-scale atrocities highlights the gap between diplomatic initiatives and realities on the ground. Besides, the preoccupation of the US and other major powers with bigger fish in other parts of the world means the killings and humanitarian crises in Sudan may only get worse.

The Democratic Republic of Congo (DRC) remained mired in conflict during the month, which was marked by a volatile mix of military offensives, a fragile ceasefire framework, and shifting international diplomatic alignments. The persistence of violence underscores the structural weaknesses of externally brokered deals in the Great Lakes region.

An important development occurred on February 24, when the Congolese army killed senior M23 spokesperson and commander of overseas operations, Willy Ngoma, in a drone strike near the mining town of Rubaya. That triggered a rapid escalation. Within days, M23 launched a major counteroffensive in Masisi district, recapturing strategic villages such as Kasenyi and Luke on February 26, just one day after pro-government forces had taken them. This cycle of gains and reversals highlights the fluidity of territorial control in eastern Congo and the inability of either side to consolidate victories.

While diplomatic frameworks proliferate, military realities on the ground continue to dictate outcomes. Ceasefire agreements remain vulnerable to collapse in the absence of robust monitoring and genuine political will. The innocent civilians continue to suffer and die.

It was a significant month for Indian foreign, economic and security policy. The framework for and interim trade agreement was announced with the US on February 06; India joined the US led critical minerals initiative; Pakistan attacked Afghanistan late in the month; elections were held in Bangladesh after the removal of Sheikh Hasina last August that brought the BNP back to power with a significant majority, with late Begum Khalida Zia's son Tarique Rahman taking over as the Prime Minister; the Presidents of Seychelles, France and Brazil visited India; PM Modi visited Malaysia and Israel; and India very successfully hosted the fourth AI Impact Summit, the first in a country of the Global South. Besides, there were the challenges thrown up by the US and Israeli attacks on Iran that started on February 28.

The fourth AI impact summit, held in New Delhi on February 18-19, was undoubtedly a major success, notwithstanding some early organisational glitches. There were participants from over 100 countries. More than 20 heads of government or state and 60 ministers along with 500+ global AI leaders attended. The objective was to highlight India's transition from a consumer of AI to a creator of sovereign, scalable AI models aimed at benefiting itself and the Global South. Succeeding in this journey while democratising access to AI will be the biggest challenge facing India going ahead.

The AI Impact Summit Declaration was signed by 89 countries, the EU and IFAD. Several other documents, such as voluntary guiding principles for resilient, innovative and efficient AI and reskilling; a charter for democratic diffusion of AI; and other voluntary initiatives were entered into by several groups of countries. Significant pledges were made for major investments and AI infrastructure, including by major Indian corporates. Under the India AI mission, an additional 20,000 GPUs will be added to the existing 38,000 + GPUs to strengthen national infrastructure.

The summit was organised around three foundational pillars, namely people, planet, and progress. There were seven thematic working groups to address the principles of development of human capital; broadening access for social empowerment; trustworthiness of AI systems; energy efficiency of AI systems; use of AI in science; democratic AI resources; and use of AI for economic growth and social good while respecting national sovereignty.

According to Nandan Nilekani, Chairman of Infosys, the principal challenges for India in AI are not just building models, but in diffusion, execution and societal inclusion. The challenges include moving from AI prototypes to deploy, managing and scaling AI solutions for 1 billion people; for the cost of running models to be

extremely low; moving into sectors like agriculture, healthcare, and education; modernising legacy systems; to build, and utilise high-quality content specific data; shift from traditional coding to AI enabled problem-solving; to fill the skills gap; and collaboration between government and the private sector to create immediate usable AI applications. India really has no option but to successfully ascend the AI mountain.

The election of a new prime minister in Bangladesh has cleared the decks for resumption of some normalcy in bilateral relations. It is important for both countries to move ahead with a positive agenda and restore the advantages that emerge out of obvious complementarities between such closely bound neighbours, while bearing in mind the core sensitivities of the two countries. Prime Minister Rahman has been invited to visit India. The issue of former Prime Minister Sheikh Hasina's stay in India will need to be appropriately addressed and can be done with goodwill on both sides. India cannot renege on its long tradition of providing sanctuary in such cases.

While the announcement of the framework for an India-US interim trade agreement was made in early February, the actual agreement has still not been signed and may be impacted by the US Supreme Court decision referred to earlier in this paper. Both sides are in contact on this issue and determined to move ahead on the basis of understandings already arrived at and within the parameters of the US Supreme Court judgement as appropriate.

The President of Seychelles, Dr. Patrick Herminie, paid a state visit to India from February 5-10. In his discussions with Prime Minister Modi, the leaders paid special emphasis on issues relating to maritime safety, security, defence cooperation, development cooperation and capacity building. These are all areas of ongoing and focused cooperation between the two countries. Seychelles is an integral part of India's MAHASAGAR Vision.

An India-Seychelles Joint Vision for sustainability, economic growth, and security through enhanced linkages was adopted. This covers political exchanges; development partnership; cooperation in the health sector and essential commodities; capacity building, human resource development, and institutional linkages; cooperation in renewables; climate action and sustainability; trade, investment connectivity and tourism; cooperation in hydrography; defence cooperation and maritime security; regional, and multilateral cooperation; and P2P and cultural ties. Several MOUs were entered into and announcements made. The latter include a special economic package of USD 175 million, provision of

1000 metric tons of grains and lentils, and the establishment of a hydrographic unit in the Seychelles with Indian assistance.

This was an important visit and is part of India's long-standing and systematic outreach to the Indian Ocean Island countries.

President Macron of France visited India (his fourth) from February 17-19, both for a bilateral visit and also to attend the AI Impact summit. It was a very substantive visit, and ratcheted up the existing significant strategic partnership between the two countries to a higher level. In his remarks at their joint press conference, Prime Minister Modi noted that the relationship between France and India was very special, and together with President Macron the strategic partnership had been given unprecedented depth and energy. As a result, the partnership was now being enhanced to that of a Special Global Strategic Partnership.

A joint statement was issued and 21 important outcomes announced. These include launch of the bilateral year of innovation; inauguration of the H125 helicopter final assembly line in Karnataka; renewal of the agreement on defence cooperation; joint venture to produce HAMMER missiles in India; several scientific/technological collaborations; and cooperation in innovation, critical minerals etc.

France is arguably India's most important strategic partner in the EU, even though it is not our biggest trade partner in the Union.

The visit by President Lula of Brazil for the AI Impact summit and thereafter for a state visit, from February 18-22, was an important step in consolidating the development of the five pillars of the strategic partnership drawn up during PM Modi's visit to Brazil in July last year. Brazil is a critical partner both in the bilateral and international realms. Both countries are members of IBSA, BRICS and the Global South; contenders for permanent seats on an expanded UNSC; and exponents of multilateralism and multipolarity. Brazil is India's most important partner in South America and the opportunities for fruitful cooperation are extensive but under- exploited.

A comprehensive joint statement was issued and several instruments/MOUs were signed, including a Digital Partnership for the Future; on rare earths and critical minerals; on cooperation in MSMEs; in mining for the steel supply chain; and in the health sector etc. In his statement at the joint press conference PM Modi noted that bilateral defence sector cooperation was steadily expanding, and that

partnership in agriculture and animal husbandry was developing, including with the establishment of a Centre of Excellence in Brazil for oilseeds, pulses and integrated farming.

The India-Brazil partnership has acquired special salience in the context of the current international situation. It needs to be further strengthened.

PM Modi paid an official visit to Malaysia, from February 07-08. It was an important visit. He was very warmly received. Modi could not visit last year for the ASEAN summit and this was out of choice his first overseas visit in 2026. The bilateral relationship was upgraded to a Comprehensive Strategic Partnership in 2024 when PM Anwar Ibrahim had visited India.

Malaysia under PM Ibrahim has emerged as a preferred partner for India both bilaterally and in ASEAN. The bilateral cooperation covers trade, economy, maritime security, defence, security, infrastructure, connectivity, energy, AI, semi-conductors and digital technologies. Malaysia also hosts the second largest population of people of Indian origin.

A detailed Joint Statement was issued and ten MOUs entered into, covering semi-conductors, health & medicine, security, technical & vocational education, disaster management, social security etc. Malaysia is India's third largest trading partner in ASEAN (approximately USD 20 billion). Opportunities for collaboration remain underutilised and should be grasped.

PM Modi visited Israel on February 25-26. The timing of the visit has, in retrospect, proved to be controversial on account of the US and Israel attack on Iran that began on February 28.

Modi was the first Indian PM to visit Israel nine years ago.

Modi addressed the Israeli Parliament in Jerusalem on February 25, where he was awarded the Medal of the Knesset. He held extensive discussions with Prime Minister Netanyahu, met the Israeli President and visited the World Holocaust Remembrance Centre.

During the visit, the bilateral relationship was upgraded to a "Special Strategic Partnership" and a Critical and Emerging Technologies Partnership entered into.

Modi stressed that "technology lies at the heart of our future partnership". The defence partnership is also to be progressed towards joint development, joint production and transfer of technology. Cooperation in agriculture is to be further

strengthened. Cooperation against terrorism is to be also enhanced. A FTA is being negotiated to unlock the trade and investment opportunities. India has an interest in the fructification of the India-Middle East-Europe Economic Corridor and the I2U2 framework among India, Israel, USA and UAE.

A detailed joint statement entitled “A Special Strategic Partnership for Peace, Innovation and Prosperity” was issued. Seventeen MOUs in diverse areas of cooperation were entered into and ten announcements made.

It remains to be seen how the outcome of the war unleashed by the US and Israel on Iran will impact the strategic Middle East region and its impact in turn on India’s relations with the countries of a region which is of critical importance to India.

The war that has broken out between Pakistan and Afghanistan, initiated by Pakistan, has further complicated the situation from India’s perspective. Apart from the fallout of the war initiated by the US and Israel against Iran, and the latter’s retaliatory attacks including against the Gulf states, the standard Pakistani play book is to accuse India of being behind any activity that hurts Pakistan and then unleash their terrorist proxies. The irony in this case is not lost on the world. The Taliban who now rule Afghanistan were in part the creation of Pakistan and the US but are now their enemy, while India is now favoured by Taliban-run Afghanistan. We have indeed come full circle.

The world was complicated and dangerous enough before the US and Israel unilaterally unleashed an illegal war against Iran. The latter in its response has chosen to extend the war to its neighbouring Gulf states, which were not party to the US -Israel attack but now have no choice but to confront Iran. How this war will end and when is an unknown at this point in time. The region is simply too consequential for India, inter-alia, from the security, economic, diaspora, trade, defence, connectivity, energy and other perspectives. The challenges ahead for India will be onerous and will require well coordinated, cohesive and comprehensive responses.



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