



Delhi Policy Group

Advancing India's Rise as a Leading Power



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Cover Images:

US President Donald Trump hosted the Prime Minister of India, Narendra Modi, for an Official Working Visit in Washington D.C., on February 13, 2025. Source: [Narendra Modi](#)

Indian Prime Minister Narendra Modi was welcomed by President of the French Republic, Emmanuel Macron, at Elysée Palace, France, on February 10, 2025. Source: [Narendra Modi](#)

Indian Prime Minister Narendra Modi and President of the European Commission Ursula von der Leyen co-chaired the EU College of Commissioners-Government meeting, on February 28, 2025. Source: [European Commission](#)

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by

Nalin Surie

Pronouncements and policies announced by the Trump Administration during the month point towards a clear intent to reorder the trans-Atlantic partnership that has been the bedrock of the US-led Western alliance structures since the end of World War II. This is being superimposed on the damage already done to international institutions by Western actions in recent years, especially after Russia's invasion of Ukraine in February 2022. Ironically, this change is being systematically manifest in the new US administration's dramatic change in approach to the war in Ukraine, to the detriment of the latter and yet undefined benefits that may derive from the rapprochement with Russia.

Public signs of this process arguably began with the Trump administration's outreach to Russia to begin the normalisation of the bilateral relationship (Trump and Putin spoke on February 12, US Secretary of State Rubio met Russia's Foreign Minister Lavrov in Saudi Arabia on February 18, and officials from the two sides met in Istanbul on February 27) and articulated, to European horror, by US Vice President Vance at the Munich Security Conference on February 14, where he said that "while the Trump administration is very concerned with European security and believes that we can come to a reasonable settlement between Russia and Ukraine, and we also believe that it's important in the coming years for Europe to step up in a big way to provide for its own defence". He went on to stress that "the threat I worry the most about vis-a-vis Europe is not Russia, it's not China, it's not any other external actor".

The biggest threat, he postulated, and which the US worries about, "is the threat from within, the retreat of Europe from some of its most fundamental values-values shared with the USA". To ensure that he was clearly understood, he spelt out in detail that this pertained to European mainstream, parties deliberately preventing right wing opinions and parties from joining the mainstream and Europe's benign approach to mass migration. In case the message was lost, he also made it clear that "if you are running in fear of your own voters, there is nothing America can do for you", and further, that "Democracy rests on the sacred principle that the voice of the people matters. There is no room for firewalls".

On the same day, the new US Defence Secretary Hegseth told the Ukraine Defence Contact Group that stopping the fighting and reaching an enduring peace there through diplomacy is Trump's top priority. He ruled out NATO membership for Ukraine and conveyed that for Ukraine to return to pre-2014 borders is an unrealistic objective. If peacekeepers are to be deployed in Ukraine, they should be part of a non-NATO mission and not covered under Article 5 of NATO. The US will not deploy troops to Ukraine and safeguarding European security must be an imperative for European members of NATO. The US, he said, faces other consequential threats and priorities, including "deterring war with China in the Pacific". He conveyed that "together we can establish a division of labour that maximises our comparative advantages in Europe and Pacific respectively".

Before the Europeans could recover from the Vance and Hegseth shocks, another sign of the Trump administration's leaning towards Russia emerged at the United Nations in New York, both in the UNGA and UNSC, on the occasion to mark the beginning of the fourth year of Russia's invasion of Ukraine. In both the UN organs, the US clashed with its traditional European allies, including UK and France, both also permanent veto wielding members in the UNSC, and sided with Russia. Sadly for Ukraine, the UNGA resolution adopted on February 24, revealed less than 100 votes in its favour including the Europeans, Turkey, Japan, ROK, Indonesia and Australia, with 65 abstentions from the Global South including India, Brazil, South Africa, and China, and 18 against including DPRK, Hungary, Israel, Russia and the US.

The meaningless UNSC resolution passed by 10 votes and five abstentions, including by Denmark, France, Greece, Slovenia and UK. It simply "implores a swift end to the conflict and further urges a lasting peace between Ukraine and the Russian Federation". So much for the much vaunted UNSC.

Lest there was any doubt about the fundamental policy change being wrought by the new Trump administration towards Russia, and the war in Ukraine and Europe, it was set at rest after the disastrous outcome of Ukraine President Zelensky's meeting with President Trump at the White House on February 28, at the end of which Zelensky was unceremoniously ushered out. Zelensky was either badly briefed or had gotten too used to being feted in NATO's European capitals. Trump accused him of not being ready for peace. Since then, in early March, the US has further suspended military assistance to and intelligence sharing with Ukraine, no doubt to ensure that the latter acts in conformity with US interests.

The Europeans finally took heed and after consulting the French President and no doubt others, UK PM Starmer got an opportunity to demonstrate some leadership by convening a meeting on Ukraine of principal European heads of government /state, including Canada and Turkey, in London, on March 02. President Trump was also consulted by Starmer.

The London Leaders' Meeting reaffirmed their determination to work for a permanent peace in Ukraine in partnership with the US while acknowledging that "Europe's security is our responsibility above all". A 'coalition of the willing' (since all European countries are not willing to supply troops) is to be set up to contribute to Ukraine's security, including through a force consisting of European and other partners.

More important, the European Council met on March 06 and had before it a plan prepared by the European Commission called "the ReArm Europe Plan" details of which were provided by Commission President von der Leyen on March 04. She posits that in these momentous and dangerous times, Europe's security is threatened in a very real way and Europe must shoulder more responsibility for its own security and the answer from European capitals is resounding and clear. "We are in an era of rearmament. And Europe is ready to massively boost its defence spending" both in support of Ukraine but also to address the long term need to take on much more responsibility for European security. She proposed a five part plan to this end for the Council to consider. She argued that ReArm Europe could mobilise close to Euro 800 billion for this purpose. Europe she said is ready to step up. Her proposals found traction.

The outcomes of the March 06 European Council meeting suggest that the EU is willing to step up to the plate to "moving decisively towards a strong and more sovereign Europe of Defence", in the words of Council President Costa on March 06.

French President Macron has offered to share France's nuclear deterrent with Europe. The likely new German Chancellor, Friedrich Merz, appears to have asked for this. (He also seeks to "achieve independence" from the US.) The UK position is not yet known.

There will undoubtedly be serious churning in global security and economic structures and balances if the moves made by the Trump administration are pursued. Even if they are not, the trust between the trans-Atlantic partners has clearly been broken. If Europe doesn't smell the coffee now, it will perhaps not for a very long time and suffer the consequences. It has today the opportunity and the wherewithal to become a genuine and strong pole in the world and

help defend Ukraine. The latter can also serve as an important economic and technological partner.

Trump seeks a fresh alignment with Russia. It remains to be seen how many concessions he is willing to make for this purpose and what the target is. His moves, including his America First Policy of February 21, would suggest that breaking the China-Russia axis and addressing the China challenge are certainly on the target board.

Will Trump actively pursue the QUAD and Indo-Pacific agendas? The record as of now would suggest he would.

NATO cannot remain unscathed by recent events and especially once, and if, Europe's own substantive defence and security identity takes shape. Will the US continue to provide its nuclear umbrella in the latter eventuality, or will Europe seek to enhance its own nuclear capacities? These are critical issues for the global order that cannot be ignored.

Europe will also have to rework its damaged relationships with Russia. There are already those in the EU who seek closer relations and those whose historical experiences with Russia would make them very wary of again partnering with Russia. Finding consensus on this will be difficult and could impact EU unity going forward. The contours of any peace deal on Ukraine will undoubtedly have an important bearing on the EU's stance.

The decision of President Trump, reiterated during his first State of the Union address on March 04, to wield the tariff and NTB weapon on a reciprocal basis with effect from April 02 with all partners is also expected to upend the international trading system. Developing countries like India will be particularly hard hit and will need to look at internal reforms to offset the downsides.

Where will China fit into all this? The likelihood of an entente between Moscow and Washington would no doubt cause concern in Beijing. Xi Jinping's decision to fully support Putin in Russia's war in Ukraine was a major strategic decision with far reaching potential consequences for the evolving international order in the context of China seeking to fulfil its dream of replacing the US as the most consequential power in the world.

At the Munich Security Conference, in the midst of the firestorm set off by US Vice President Vance, Chinese Foreign Minister Wang Yi held out a hand of friendship to Europe. In his address on February 14, he stressed the need to work for an "equal and orderly multipolar world" and suggested that "China will

surely be a factor of certainty in this multipolar system, and strive to be a steadfast constructive force in a changing world". Wang posited that "China has always seen in Europe an important pole in the multipolar world. The two sides are partners, not rivals.... China is willing to work with the European side to deepen strategic communication and mutually beneficial cooperation". Time will tell whether the Chinese offer will find traction in mainstream Europe.

More important, though, was the telephone conversation between Xi Jinping and Putin on February 24. According to the Chinese side, the call was at Putin's request and the latter provided an update on the latest interactions between Russia and the US. Xi for his part conveyed that: "Our bilateral relationship has a strong internal driving force and unique strategic value.... No matter how the international landscape changes, our relationship shall move forward at its own pace....and inject stability and positivity into international relations".

The Kremlin readout of the exchange was much shorter, but spoke of a lengthy telephone conversation regarding the further development of the comprehensive partnership and strategic cooperation between the two countries. Xi reportedly expressed "his support for the dialogue initiated between Russia and the US." Putin and Xi reportedly "emphasised that the Russian-Chinese political ties are an essential stabilising factor in global affairs. This relationship is strategic in nature, not subject to political bias, and not aimed against anyone". (The Chinese readout quotes Putin as saying that "Russia attaches great importance to its relations with China.... Developing relations with China is a strategic choice made by Russia with a view to the long term; it is not an act of expediency".) So far, they appear to be on the same page.

The impact of the US-Russian rapprochement on Sino-Russian relations and the evolution of the triangular relationship among the US, Russia and China going forward, along with the European response, will majorly impact the evolution of the international order of the future. India will need to leverage its partnerships with the US and Europe to good effect to ensure its vital security and development interests are protected.

The first phase of the Gaza ceasefire ended on March 01, with Israel backing out from proceeding with the agreed second phase till all hostages, dead and alive, are released. Humanitarian aid flows have been stopped as a means to put pressure on Hamas. Israel, with the support of the US, in effect, wants to prolong phase one. This is reportedly unacceptable to Hamas, which wants to move on to phase two which from its perspective provides safeguards for a longer term arrangement of benefit to it. Interestingly, the US has directly

engaged with Hamas (a designated terrorist organisation by it) to pursue its proposal to extend the ceasefire during Ramadan/Passover and then “on the first day of the framework, half of the living and deceased hostages will be released and upon its conclusion-if agreement is reached on a permanent ceasefire-the remaining living and deceased hostages will be released”¹.

Hamas is so far baulking at this, but is under threat both from Israel and the US to agree. In fact, President Trump has tweeted on March 05 issuing a last warning to Hamas to release all of the hostages now and return the bodies of all the dead hostages or “it is all OVER for you”(Hamas). He announced that he is sending everything Israel needs to finish the job and that no Hamas member will be safe if they don't do as he says.

President Trump's support for Israel is clearly even stronger than that of the Biden administration.

Israeli military operations continued in Syria, On February 23, PM Netanyahu asserted that southern Syria must be completely demilitarised and warned that Israel would not accept the presence of the forces of the new Syrian, Islamist-led, government near its territory.

Turkish President Erdogan warned on March 03 against intervention in Syria. A division of the country would not be acceptable to Turkey, which has its own Kurdish problem. Separately, the Special Envoy of the UNSG for Syria warned that the situation in north east Syria (under Kurdish control; US backed) complicates the political transition in the country.

Syria is still a long way from achieving unity and stability in the post-Assad era. There are pulls and pressures from both regional and big powers. It is yet another pawn in the game among them.

Similarly, the situation in Sudan showed no sign of improvement. Instead, there is talk of a division of the country.

In the east of the Democratic Republic of Congo too, the situation continued to deteriorate and the M23 rebel group made territorial gains. The law and order situation in the occupied areas worsened. A summit of regional leaders in Tanzania on February 08, attended by both Presidents of DRC and Rwanda, and a UNSC resolution unanimously adopted on February 21, brought no relief. It

¹ Source: CNN, March 01, 2025.

would appear that the appetite for territory and resources trumps all norms of international law in that region.

It was a busy and significant month for Indian foreign policy, particularly in the light of the contemporary international situation. PM Modi visited France, on February 10-12 and Washington D.C., on February 13. Both visits were substantive and the outcomes significant.

In France, PM Modi also co-chaired the third Artificial Intelligence Action Summit with President Macron. A Final Communique was adopted but not signed by the US and UK. 60 countries including France, India, China and Canada signed. The intention is for voluntary commitments to make this critical emerging technology more inclusive and sustainable. An AI Foundation and the Council for Sustainable AI were set up.

The US approach under the new Trump administration was articulated by VP Vance who argued that " we need international regulatory regimes that foster the creation of AI technology rather than strangle it". President Macron recognised in this context that perhaps the EU needs to relook its rules on AI so that EU players are not put at a disadvantage in this critical emerging technology space and suggested that it will be necessary to synchronise with the rest of the world.

In his concluding intervention at the Summit, PM Modi noted that there was unity in both vision and purpose across stakeholders. He conveyed to his audience that the Global Partnership for AI must be truly global and more inclusive of the Global South, its priorities, concerns and needs. In his opening intervention, he had reminded his audience that while some worry about machines becoming superior to humans, it is us humans who hold the key to mankind's collective future and shared destiny.

India will host the next AI Summit. France and India also issued an important bilateral Declaration on AI focused on the development of safe, open, secure and trustworthy AI.

The bilateral component of the visit to France resulted in substantive outcomes consistent with their strategic partnership. The Joint Statement issued in Marseille on February 12 highlights defence and security collaboration, cooperation in defence technologies, IMEC, the need to further strengthen India-EU relations, trilateral cooperation with Australia and UAE, cooperation in the space sector, collaboration in nuclear energy (including SMRs and AMRs), the need to further tap opportunities for trade and investment, collaboration in the health sector etc.

From France, PM Modi proceeded to Washington D.C. where he was able to revive his earlier engagement with President Trump.

A far reaching Joint Statement was issued on February 13. The decisions announced include: The US-India COMPACT for the 21st century (for military partnership and accelerated commerce and technology), the signing in 2025 of a new ten year framework for the US-India Major Defense Partnership, plans to pursue new procurements and co-production of anti-tank missiles and infantry combat vehicles, commencement of negotiations this year for a reciprocal defence procurement agreement, accelerating defence technology cooperation, establishing the Autonomous Systems Industry Alliance (ASIA) to scale industry partnerships and production in the Indo-Pacific, and support and sustenance for the overseas deployments of the US and Indian militaries in the Indo-Pacific.

A new target was set for bilateral trade, namely doubling it to USD 500 billion by 2030. For this purpose, the first tranche of a multi-sector Bilateral Trade Agreement is to be negotiated by fall of 2025. Both sides will also collaborate to enhance US exports of industrial goods to India, export of labour intensive manufactured products from India to the US and increase trade in agricultural goods. Opportunities for US and Indian greenfield investments in high value industries in each others markets will be encouraged.

Important agreements were also arrived at on cooperation in the Energy sector including supply of crude oil by the US and commitment to “fully realize” the 123 Civil Nuclear Agreement.

On the Technology and Innovation front, the US-India TRUST initiative to transform the relationship utilising strategic technology was launched, as was INDUS Innovation (focus on space, on energy and other emerging technologies) modelled after the INDUS-X platform. Critical programs under these rubrics were announced including in respect of AI, building trusted and resilient supply chains.

Important initiatives were announced in respect of critical minerals, including the launch of the Strategic Mineral Recovery Initiative to recover and process critical minerals including lithium, cobalt and rare earths from heavy industries like aluminium, coal mining, oil and gas. Collaboration in space is to be enhanced.

The US and India will work together to counter the common challenge of unfair practices in export controls by third parties (read China) seeking to exploit over concentration of critical supply chains.

Cooperation in the Indo-Pacific will be progressed, and ahead of the QUAD summit in India, new Quad initiatives will be activated on shared airlift capacity to support civilian response to natural disasters and maritime patrols to improve interoperability.

Meetings of partners of IMEC and I2U2 will be convened within the next six months in order to announce new initiatives in 2025.

Migration and mobility issues were addressed. It was agreed to streamline avenues for legal mobility of students and professionals, facilitating short term tourist and business travel while aggressively addressing illegal immigration and human trafficking.

Foreign Secretary Vikram Misri described the visit as "very substantive and productive". The joint statement, he said, "lays down the blue print for the near and medium term future of the India-US relationship". There were deepening strategic convergences on regional and global issues. He acknowledged, though, that there are likely hurdles on the trade front, saying that "both countries will take an integrated approach to strengthen bilateral trade across the goods and services sector. This will include themes such as increasing market access, reducing tariff and non tariff barriers and deepening supply chain integration between the two countries".

The engagement has been well begun with the new Trump administration, but the partnership will require careful nurturing.

There were also two important incoming high level visits to India during the month.

The Amir of Qatar paid a state visit to India, February 17-18. His last visit was in 2015. He was received at the airport by PM Modi, who had last visited Qatar in February 2024. Qatar is a major supplier of LNG to India. There is a large Indian community in Qatar, around 25% of Qatar's population.

A joint statement was issued and Important agreements reached. The bilateral relationship is to be elevated to a strategic partnership, trade is to be doubled by 2030, a revised double taxation avoidance agreement was signed, negotiations on the India-Qatar Bilateral Investment Treaty are to be expedited, the existing JWG on trade and commerce is to be elevated to a Joint Commission, the possibility of entering into a bilateral Comprehensive Economic Partnership Agreement is to be explored, Qatar has committed to invest USD 10 billion in India, bilateral energy cooperation will be enhanced, cooperation in food security and protection of supply chains will be strengthened and issues related

to expatriates, manpower mobility, dignity, safety and welfare of workers will be addressed.

The outreach to Qatar is an integral part of India's Act West policy that continues to deepen and diversify. India's links with the Gulf region are anchored in antiquity and mutually beneficial exchanges.

India's relations with the European Union received a major filip with the visit of the President of the European Commission, Ursula von der Leyen, accompanied by her full College of Commissioners on February 27-28. This was the first such visit of the College to India. She was hosted by PM Modi. The second (ministerial) meeting of the India-EU Trade and Technology Council (TTC) was held on February 28. The individual Commissioners held 20 meetings with their Indian counterparts.

The EU is among India's topmost trade and economic partners and the untapped opportunities are very substantial. India-EU trade stands at USD 135 billion and trade in services at around USD 53 billion. Collective EU investment in India since 2000 is close to USD 120 billion. Indian investment in the EU is estimated at USD 40 billion. Around 6,000 companies from the EU are in India and the figure for Indian companies in the EU is around 1,200.

The Indian diaspora in the EU is estimated at around 1.65 million, including 120,000 students.

In view of the virtually stagnant economic growth in the EU, problems with China and now the US, the EU needs fresh markets, technological partners and reliable supply chain arrangements. India too has similar needs. The EU visit was thus most fortuitous.

PM Modi and Commission President von der Leyen agreed upon eight concrete steps, namely expediting conclusion of the bilateral FTA by the end of the year, focused exploration of new initiatives and programs on defense industry and policy, taking stock of the IMEC initiative, engagement on maritime domain awareness, early meeting of the TTC to deepen cooperation in semi-conductors and other critical technologies, focus on green hydrogen, strengthen collaboration in the Indo-Pacific including through trilateral cooperation and strengthen cooperation on Disaster Management.

PM Modi announced at the joint press conference on February 28 that it has been decided by both sides to create a bold and ambitious road map for the India-EU partnership for the period beyond 2025 and this will be launched at the next summit.

Successful implementation of the agreements arrived at will significantly benefit both India and the EU. It remains to be seen, though, whether the Commission will be able to convince the member states to make this happen.

February 2025 may mark the beginning of a new paradigm in international relations, the shoots of which have begun to appear. Indian policy makers will need to be even more proactive and nimble footed to ensure that Indian interests are protected as new complexities, challenges, dangers and opportunities arise. The months ahead are going to be challenging to say the least.



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