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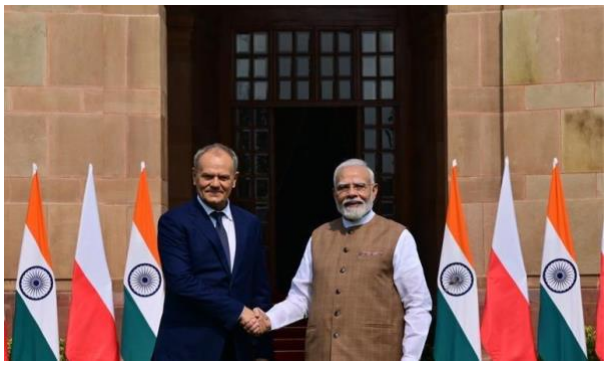
Advancing India's Rise as a Leading Power

GLOBAL HORIZONS

OCTOBER 2026

Author

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Volume IV, Issue 10

Delhi Policy Group

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www.delhipolicygroup.org

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Cover Images:

1. *Prime Minister Narendra Modi with Polish Prime Minister Donald Tusk, New Delhi on October 22, Source: PIB*
2. *Quad Foreign Ministers' Meeting on the sidelines of the G20 Foreign Ministers' Meeting, Atlanta, on 31 October 2026. Source: U.S. Department of State*
3. *EAM S. Jaishankar at the G20 Foreign Ministers' Meeting, Atlanta, on 30–31 October 2026, Source: X/@DrSJaishankar*

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by

Nalin Surie

The overarching concern across the world during the month, among policy makers involved with the broad spectrum of international relations, was over the outcome of the midterm elections in the US on November 3, 2026. This was understandable and logical given the capricious nature of US policy making during the last two years under President Trump. The implicit hope among US allies and partners was that the elections would ideally give control of both the Houses of the US Congress to the Democratic Party so that the President's virtually unfettered powers would be constrained and some consistency and durability in US policies could be restored. This has come to pass and will have serious consequences for both domestic and geopolitical relations, including for the ongoing wars in Ukraine and Iran; for the US-China-Russia-Europe quadrangle; for US-India relations; for multilateralism; and for international economic and financial institutions.

The expected and hoped for happened, and by a much bigger margin than anticipated. The probable causes include the Iran war, the rising cost of fuel and inflation in the US, and excesses on immigration and other discrimination issues. But will this make the Trump Administration more reasonable, more predictable, and more willing to return to positive leadership for public and global good? And will the Democratic Party behave in a relatively non-partisan and non-vindictive manner and address itself to resolving critical issues on the domestic and international agendas, including bringing an early end to the wars in Ukraine, Iran, Gaza/West/Lebanon etc.? Time will tell, but the issues are consequential and there is no time for celebration over the change in the power equation between President Trump and a Democratic Party controlled Congress. Trump remains President and retains substantial decision making powers. Both sides will need to respect the election result and constitutional provisions to work out a via media to meaningfully address and resolve both domestic and international problems.

The above notwithstanding, certain conclusions can justifiably be drawn.

President Trump has suffered a serious personal and political setback. His initial reaction has been subdued but this is only the beginning, and going forward he is capable of acting arbitrarily and without consideration of the consequences. The latter because irrespective of the election results, the US remains the world's most powerful country, militarily, economically, and technologically. And, the US President has a powerful veto on legislation that can be exercised.

Trump's control over the Republican Party is likely to weaken.

The MAGA movement has suffered a significant political setback but has it been defeated? The latter conclusion may be a premature, since it remains to be seen whether the MAGA agenda (e.g. economic nationalism, social, religious and cultural conservatism, immigration restrictions and populism), which transcends Trump, remains in play.

The US Congress will play a greater role in US foreign and security policies. The world will have to come back to terms with this. Will this mean a significant change on US policy on Gaza and related issues, on greater assistance to Ukraine, on the war against Iran, on the perceived nature of the threat from China, on the future of NATO, on the security balance in Eurasia and sanctions on Russia, on the approach to the Western Hemisphere, on the Indo-Pacific etc.? Will there be a change in US policies on international trade, technology transfers, AI etc?. These are highly consequential issues that will seriously impact countries like India and the international community at large.

Can the loss of trust engendered by the Trump administration in its allies and partners by its actions be restored? Unlikely, unless US strategic leadership can quickly recover its strategic coherence. At the same time, it would be reasonable to presume that going forward, the US will maintain continuity in its fundamental national interests and intend to remain the most powerful nation in the world but without certainty about the manner in which this goal would be achieved. For a country like India, this is a major challenge that will have to be negotiated.

Arguably, the election setback will strengthen the bargaining position of Presidents Putin and Xi vis a vis President Trump. On Iran, President Trump will want to appear victorious. On Israel, he may face heat on the Palestine issue. The re-election of President Lula in Brazil could strengthen the hands of the Mexican President in dealing with the Trump Administration in the remaining two years and the decision of Canada and the EU to build an Alliance for the Future would help Canada in reducing its traditional dependencies on the US.

Elections were held in Israel on October 27. PM Netanyahu's coalition, as expected, did not win a majority. (Turnout, at 78%, was very high). With 53 seats, they were 8 seats short in a House of 120. They lost 15 seats. The other Jewish opposition group led by Gadi Eisenkot were 13 short, while the Arab-led parties won as many as 19 seats and can theoretically become king makers. The question is whether the Jewish groups are willing to work with them. There are reports that Eisenkot is willing to look at this option subject to the Arab parties agreeing to several conditions pertaining to Israel's fundamental interests. The President has the right to decide which group to

invite to form the government and can give it upto 42 days (28+14) to do so. He has announced that he would designate a member of the Knesset on November 08 to form a government.

A change in government in Israel may not necessarily lead to a substantive change on the positions on Iran, Hamas and Hezbollah and towards the region as a whole but could impact cease fire arrangements in Gaza and its future governance structure; on West Bank settlements; on negotiations with the Palestinians; on the war with Iran; on Lebanon etc.

Failure to take the Arab parties into government would further entrench their status as second class citizens in Israel.

Netanyahu continues as PM till the President makes up his mind, and is likely to leave no stone unturned to come back to power. He has too much to loose. A national unity government cannot be ruled out.

In case of Netanyahu not returning to power, US support to Israel is unlikely to wane but there could be changes in emphasis.

The war in Ukraine is not the only serious political problem facing Europe. Popular discontent and civil unrest, including riots, grew and spread across France, Germany, Italy, Spain, Portugal etc. These are essentially driven by the Gen Z cohort who are protesting high cost of living, poor education facilities, unaffordable housing, budget cuts on social spending on account of additional spending on defence etc.

Europe's substantive economic support for Ukraine in its war is clearly contributing to unintended consequences which are impacting the political scene in these countries and could impact the outcome of forthcoming elections in favour of right- leaning parties.

The G20 Foreign Ministers met in Atlanta, Georgia on October 30-31. To the annoyance of the Europeans, the Russian Foreign Minister was also invited. As a result, the traditional family photograph at the end of the meeting became a casualty. A Chair's statement was issued that stressed that the US intention is to take the G20 back to focusing on its core mission of discussing global economic challenges, helping improve lives of citizens and creating economic prosperity for everyone. Ironic, given the Trump Administration's policy of unilateralism on trade and economic matters.

There was no consensus on the issuing of a joint communique at the end of the meeting on account of the wars in Ukraine and Iran, US trade policies, freedom of navigation and South Africa's exclusion. A short Chair's statement focusing on US priorities was issued by Rubio, according to which issues discussed included energy security, where it was clarified that every country is on its own energy path and each county's needs will demand different energy sources. One country should not be constrained

by what another country decides to use. Every country is entitled to make its own sovereign choices.

Other issues covered were supply chain resilience covering fertilisers, raw materials for basic manufacturing, critical minerals for energy security, advanced manufacturing and emerging technologies; geopolitical tensions on account of global energy disruptions in 2026; and weaponisation of normal food supply chains. Ebola found mention too.

The G20 Summit will be held in December in Miami under President Trump's chairmanship.

On the sidelines of the G20 FMs meeting, the QUAD FMs also met. India's EAM Jaishankar attended both meetings.

The effort to sustain the slow and steady development of the QUAD partnership is useful. The focus on this occasion was on Economic Prosperity and Security. The Joint Press Release identifies progress on key initiatives in the Indo-Pacific including securing critical minerals supply chains, supporting energy security in the Indo-Pacific, advancing ports infrastructure in Fiji; building infrastructure capability across the Pacific; progressing secure and resilient digital connectivity in that region; improving Maritime domain awareness; deepening cooperation on cyber security; developing shared logistics capabilities and building capacity to respond to disasters.

An unofficial translation of the full text of the Mecca Defence Agreement between Saudi Arabia, Turkey and Pakistan is now available and would suggest that it is substantive and can evolve into something bigger regionally. The implications for India are also clear.

It states, inter alia, that, "if the territorial integrity, sovereignty or internationally recognised borders of any of the Parties are threatened or endangered, the Parties shall use all necessary means to eliminate such threats or dangers"; that "an externally originating armed attack against any of the Parties shall be considered an attack against all the Parties", and "the Parties shall immediately assist the attacked Party making full use of all means of mutual assistance that they can provide to one another". The Parties have also, subject to, "mutual agreement", agreed to " support technology sharing among defence industry institutions, joint technology development, joint production and cooperation among defence industry organisations"; "share intelligence through mutually agreed secure channels"; and subject to "availability and compatibility", " provide one another with logistical support in peacetime, wartime and other emergencies, including weapons, ammunition, fuel, spare parts, and other equipment".

The Mecca Agreement is to remain in force " indefinitely" but any party may withdraw from it after 10 years have elapsed from its entry into force by giving three months notice in advance.

The war in Ukraine took on a bloodier face during the month. Civilian casualties continued to mount. The Russian effort clearly was to break Ukrainian morale before the forthcoming winter. Attacks on energy , transport and civilian infrastructure intensified. Russia increasingly employed jet powered drones and quasi-cruise missiles. US policy towards Ukraine during the month remained unhelpful. However, a report suggest that on the battlefield, Ukraine was able to claw back 26.29 square kilometres of territory. The conflict expanded in the Black Sea area and Russia reportedly attacked grain and cargo vessels.

Ukraine's campaign against Russian military, logistical and energy infrastructure continued and was reportedly effective.

Relations between Presidents Trump and Zelenskyy were not at their best. Ukraine refused to hold back on attacks on Russian energy targets inspite of US proposals.

Starlink/Starshield services to Ukraine were disrupted for a while.

Peace negotiations through US intermediaries went nowhere. The US seemingly continued to lean towards Russia. Europe remained steadfast in its support for Ukraine.

The war in Iran began to look more like an extended game of bluff, albeit very deadly and impacting the whole world. The US focus was on restoring the flow of oil through the Strait of Hormuz, blockading movement of Iranian crude out of the Strait, strengthening sanctions on Iran and stressing that Iran could under no circumstances be allowed to acquire nuclear weapons. Iran for its part has demonstrated and made it abundantly clear that if attacked it has the capacity and would inflict unacceptable damage on US interests in the Gulf, attack the critical infrastructure and energy facilities of the US's Gulf partners, and use its Houthi allies to control the Bab al-Mandab Strait. It can also lean on its Hezbollah ally in Lebanon.

Peace talks continued, notably through Qatari good offices, but the gap between the two sides reportedly remains wide. President Trump had said that the Iranians were waiting to see the outcome of the elections to the US Congress before deciding how to proceed. The Iranians have said that the election outcome was a vote against the war with Iran. Trump has post the elections again stressed that under no circumstances will he allow Iran to have nuclear weapons and has justified the attacks in Iran. He keeps threatening that he may have to destroy Iran and did so again after the mid term elections outcome as well.

The way forward is not clear. In the meantime, the world economy continues to pay a very heavy price, especially developing countries like India. Innocent sailors trapped in the Persian Gulf, including many Indians, continue to be killed. Hopefully, good sense will prevail on all sides and a long term peaceful settlement will be reached to end the war in Iran and restore peace and normalcy in the critical Gulf region. Both the US and Israel on the one hand and Iran on the other will need to recalibrate for this purpose. The election outcomes in both Israel and the US would suggest that this is what their populations desire. Iran too must heed the signs of the time.

In Gaza, October 07 marked the third anniversary of the Hamas attack. The October 2025 ceasefire was violated by Israel. Palestinian deaths and casualties continued to mount; the humanitarian crisis persisted. The search for a political settlement remained elusive.

On the West Bank, settler violence, settlement expansion, demolitions and Israeli military operations continued.

In Lebanon, Israeli occupation in the South continued. Israel continued to project the threat from Hezbollah which has Iranian support.

In Syria, Israel expanded its buffer zone footprint. Jordan struck IS sites in Syria.

In effect, the killings, turmoil and military activity in the West Asia region persisted. A new regional balance has not yet been achieved. The outcome of the Iran war and the interests of Israel, the US, Russia, Turkey, the Gulf states and some major European countries intersect here. A resolution will require a Herculean effort and a genuine desire to bring durable peace and security in this vital geographical region.

The Fifth Plenum of the 20th Central Committee of the Communist Party of China was held in Beijing, October 26-29. Unlike in the past, this Plenum did not focus on economic issues since the 15th Five Year Plan has already been approved. Instead, it focused on the study of major issues for advancing the Party's full and rigorous self governance. It was also part of the preparatory process for the 21st Party Congress announced for the second half of 2027.

A detailed communique was adopted and has the Xi Jinping imprint all over it. Some highlights:

1. The Party has found two answers to the question of how to escape the historical cycle of rise and fall. These are the people's oversight over government and the Party's self reform. These are unique to the CPC;

2. Xi Jinping has demonstrated tremendous political courage and strong sense of responsibility in confronting the grave situation marked by weak, hollow and watered down Party leadership, lax, superficial and ineffective self supervision and self governance in the Party. This has given birth to Xi Jinping Thought on Party Building;

3. Conditions have been created for leading the people in safeguarding China's sovereignty, security, and development interests, maintaining social harmony, and stability;

4. Stress on adhering to a top down approach;

5. The Party tolerates no corruption. This fight will be carried through to the end;

6. Progress should be pursued while ensuring stability. The new development philosophy will be fully and faithfully applied on all fronts to foster a new pattern of development; tap deeper into the potential of domestic demand; further deepen and reform and opening up and pursue sustained and high-quality economic growth driven by innovation; and

7. To ensure security while pursuing development, initiatives will be taken to make public services inclusive, meet essential needs and provide a cushion for the people most in need. Better results will be delivered, including on matters pertaining to social stability etc.

Only 74% of the Central Committee's original members attended (162 full and 117 alternative members). The missing were mostly victims of the anti corruption drive, those under investigation etc. Important leadership changes and expulsions (33) were announced. The latter includes Zhang Youxia, former Vice Chairman of the powerful CMC and Politburo member Ma Xingrui.

General Zhang Shenming was elected to the Politburo. He is also Vice Chairman of the CMC. 10 alternate members were promoted as full members of the Central Committee.

In recent months, senior PLA leaders have been purged on grounds of corruption etc. There is no suggestion that this campaign will soften in the months ahead. The impact on the effectiveness of the armed forces, though, cannot be underplayed. But Xi is determined to ensure that the PLA remains under the Party's complete control.

The outcome of the Fifth Plenum would suggest, inter alia, that Xi has no intention of giving up power at the 21st Party Congress. He seeks complete domination of the CPC on all aspects of Chinese governance and power; complete loyalty of the PLA to the CPC; the Great Rejuvenation of the Chinese nation an all fronts and historical recovery from past weakness and foreign domination; building a world class military; high quality development a primary task; achieving greater self reliance and strength in S&T; ensuring both security and development in that order; continuing to expand high standard opening up; and actively participating in reform and development of the global systems of governance by adjusting the existing status quo in accordance with Chinese interests and growing power.

On October 07, US Secretary of State Marco Rubio delivered a landmark address in Athens under the shadow of the Parthenon. The location was clearly and deliberately chosen; the message unambiguous viz, the essential need for the West and Christendom to rediscover the story of its civilisation which is " the greatest story ever known to man. And it began here, with the first men and women of the West".

Rubio stressed that the West finds itself at a crossroads and the course it takes "will determine whether the West maintains its place at the head of the world or resigns itself to a future of atrophy and servitude and decline". The US, he said, had decided to unapologetically pursue national power so as to take back control of critical supply chains, to reindustrialse the economy, to rebuild its defence and to fight for dominance of the technologies and industries of the future. He called for rebuilding the strained bonds of affection between the US and Europe which must not be allowed to be broken. The transatlantic alliance he stated is not a zero sum game. He called for the institutions and alliances of the West to be rebuilt to face the threats of war, competition between great powers, vulnerability, aggression, terrorism etc. Sovereignty has to be defended, he asserted.

The attack on China was implicit but on Iran explicit, which was no doubt intended to convey that they both pose a threat to the West. More significant, though, was the remarkable arrogance of the message in terms of US policies going forward, and disrespect for other civilisations, religions and their achievements.

The humanitarian situation in both Sudan and the DRC worsened.

In Sudan, the war between the SAF and RSF remained deadlocked. Abuses were committed by both sides. A drone war was fought over the cities; a US sponsored truce plan was stuck on sequencing, i.e., truce first or RSF withdrawal first. The hunger and displacement crisis deepened. The inability of the UN and the major powers to bring an end to the crisis in Sudan reflects the virtual breakdown of their ability to restore peace and stability where the protagonists have strong external backers.

Fighting between the Congolese armed forces (FARDC) and the M23 rebel forces continued in North and South Kivu. The M23 retained control of Goma and Bukavu and attempted to extend its original areas of operation. The entry of former President Joseph Kabila (sentenced to death last year and under US sanctions) at the head of Front for the Refoundation of the Nation (FRN) which includes the M23, added a new (internal) dimension to the conflict. The FRN intends to unify opposition to President Tshisekedi.

Rwanda is the power behind M23 and has designs beyond its borders, including in the Great Lakes region.

Qatar is attempting mediation but given the prevailing situation in the Gulf it remains to be seen whether it, the US and the AU can bang heads together to arrive at an

acceptable resolution. The fact that the region in question is rich in rare earths etc. only adds to the complexities.

The situation in Tigray, Ethiopia is threatening. Fighting resumed in late September and while federal forces took Tigray's main towns by mid October, the TPLF holds mountain areas and clashes with federal forces continued. Eritrea broke diplomatic relations with Ethiopia after the latter expelled its diplomats. Ethiopia accuses Eritrea of supporting the TPLF. The war in Tigray now threatens to become a confrontation between these two prickly neighbours.

The problem between the Ethiopian federal government and the TPLF is not new. The November 2022 Pretoria agreement on cessation of hostilities had ended the two year conflict between them, but had not resolved the underlying political, security and territorial disputes. Both sides reportedly differed on the sequencing of the peace process with the central government focusing on the disarmament provisions.

The UN essentially remains an ineffective bystander to what could, if not resolved, have implications, inter alia, for unity and stability of Ethiopia, for hostilities between Eritrea and Ethiopia, for security in the Horn of Africa/Red Sea region, and for the effectiveness of the African Union which had brokered the Pretoria Agreement.

The PM of Poland paid an official visit to India, October 21-23. This followed the visit of PM Modi to Poland in August 2024. This exchange of visits represents a somewhat belated realisation by both sides of the need to add substance to an important relationship. Poland is an important and growing member of the EU with industrial, defence and other capacities of interest to India. In EU ranking it is 5th in terms of population, 6th in size of economy, fastest in growth rate, high in military spending etc. It is considered the economic anchor of Central and Eastern Europe. Poland is part of the Visegrad 4 group comprising Poland, Hungary, Slovakia and Czechia (all eastern members of the EU) and is an important and active member of NATO.

Bilateral relations during the Cold War period had substance. It was agreed during the visit to double bilateral trade by 2030, establish a Defence Industry Dialogue and a Counter Terrorism Dialogue. Work is underway to finalise arrangements on mutual protection and exchange of classified information, cooperation in critical minerals, coal gasification, in space, in science and higher education etc. Progress on these sectors will add substance to the bilateral strategic partnership.

The world was already in an uncertain and dangerous phase before the elections to the US Congress. The outcome of those elections and their uncertain impact on US policies going forward will make Chancellories all over the world hope and pray that good sense prevails. At the same time, countries like India have little option but to also plan to face contingencies arising out of the least favourable outcomes.

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