



# Delhi Policy Group

Advancing India's Rise as a Leading Power



## GLOBAL HORIZONS

### JUNE 2026

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**Delhi Policy Group**

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### ABOUT US

Founded in 1994, the Delhi Policy Group (DPG) is among India's oldest think tanks with its primary focus on strategic and international issues of critical national interest. DPG is a non-partisan institution and an independently funded non-profit Trust. Over past decades, DPG has established itself in both domestic and international circles and is widely recognised today among the top security think tanks of India and of Asia's major powers.

Since 2016, in keeping with India's increasing global profile, DPG has expanded its focus areas to include India's regional and global role and its policies in the Indo-Pacific. In a realist environment, DPG remains mindful of the need to align India's ambitions with matching strategies and capabilities, from diplomatic initiatives to security policy and military modernisation.

At a time of disruptive change in the global order, DPG aims to deliver research based, relevant, reliable and realist policy perspectives to an actively engaged public, both at home and abroad. DPG is deeply committed to the growth of India's national power and purpose, the security and prosperity of the people of India and India's contributions to the global public good. We remain firmly anchored within these foundational principles which have defined DPG since its inception.

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*The views expressed in this publication are those of the author and should not be attributed to the Delhi Policy Group as an Institution*

### Cover Images:

1. Indian Prime Minister Narendra Modi attends the G7 Summit in Evian on June 16, 2026. Source: [X/@narendramodi](#)
2. Indian Prime Minister Narendra Modi paid a three-day state visit to Seychelles as the Guest of Honour for the country's Golden Jubilee Independence celebrations, from June 27 to 29, 2026. Source: [PMO Gallery](#)
3. Myanmar President U Min Aung Hlaing held talks with Prime Minister Narendra Modi in New Delhi on June 1, 2026, during his first official visit to India from May 30 to June 3, 2026. Source: [X/@narendramodi](#)

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## Global Horizons

June 2026

by

Nalin Surie

The United States continued during the month to keep the world on tenterhooks. Its approach to its war against Iran and the ongoing war in Ukraine and its relationships with other major partners reflected an element of nonchalance that bordered on the irrational.

The 14 point MOU entered into with Iran on June 17/19 brought about a cessation of military operations, though not in Lebanon, and an agreement to negotiating and achieving a final deal within sixty days, extendable with mutual consent. Iran has agreed to safe passage of commercial vessels with no charge for 60 days from the Persian Gulf to the Sea of Oman and vice versa. A package of USD 300 billion will be worked out for reconstruction in Iran. Sanctions on Iran will be lifted as part of a final deal. The nuclear issue will also be addressed in the latter.

In effect, both sides have kicked the can down the road and bought sixty days or more to resolve old issues not settled for decades and new issues of freedom of transit.

Nevertheless, it has given some breathing space for those countries most affected by the closure by Iran of the Strait of Hormuz, including India. And it gives time to President Trump to address the domestic downsides of his Iran war on the mid term elections in the US.

Negotiations on a final package are reportedly underway with Qatar and Pakistan acting as intermediaries.

The question remains whether the US approach to the negotiations will be genuine or simply intended to buy time. This because there appears to be a broad based consensus among military experts and analysts that the US has failed to achieve its announced objectives in Iran and indeed that Iran may have emerged stronger in some respects, including in its ability to threaten its Gulf neighbours. The question also arises why Iran's ability to use the Strait of Hormuz as a hostage was not factored into US war policy, although this has reportedly been extensively gamed over the years by the US CENTCOM.

One of the objectives of the US-Israel combine when they unleashed massive air strikes on Teheran etc on February 28 and assassinated the entire top Iranian leadership, including the religious head Ayatollah Ali Khamenei, was to bring about regime change and hopefully a mass uprising against the religious regime. Not only did that not happen, but also when the funeral ceremony of the late Ayatollah took place in early July, Iranians turned out in massive numbers to pay homage. This is not hearsay but witnessed live by the international media, including Western. How could the world's sole super power go so wrong? The message has not been lost on the Gulf nations and others.

The implications of this for the region and Iran's intention of wanting to dominate it are many. The Gulf Arab states have no doubt already factored in the future reliability of US security guarantees, the ability of Iran to attack their infrastructure, and have also begun work on reducing their dependence on the Strait of Hormuz. In the latter context, the role of Oman may well grow in salience and hopefully it will insist on sustaining the freedom of transit provided for in the Law of the Seas Convention. All this has serious implications for India for which the region is a critical pole in its foreign, security and economic policies.

Will the US live with the general assessment that it has emerged second best from its unilateral war on Iran? President Trump regularly threatens to resume the attacks on Iran if a deal acceptable to him is not reached. His latest warning was broadcast on Fox News on July 06.

At the same time, it remains to be seen if Israel will play spoiler in Lebanon or will President Trump force it to keep the peace there. So far though, Israel has not really reined in its operations in Lebanon against Hezbollah, nor on the West Bank in Gaza. There is good reason to believe that going forward, the US and Israel will continue to act in close coordination on Iran.

A US brokered conditional ceasefire between Israel and Lebanon came into force on June 19. Hezbollah has rejected that. Israel continued to deny access to areas under its control in Lebanon. The ceasefire does not extend to Gaza where the humanitarian crisis remained dire. Reportedly, almost 60% of Gaza's population is unable to meet its essential needs of food.

The US focus on extricating itself from the Iran imbroglio that it has created has meant turning a Nelson's eye to the raging conflict in Ukraine. The latter is now attacking targets deep in Russia and Crimea with considerable impact on infrastructure and energy availability. Russia for its part continued its heavy

attacks across Ukraine including on Kiev. The madness continued and there are some estimates that suggest that since the war began there have been more than two million casualties with between 125,000 to 150,000 killed in Ukraine and 450,000 killed in Russia. The damage within Ukraine will take years to repair. The war has gone on longer than World War I.

Ukraine continued to receive fulsome support from the EU and UK and its defence industry continued to grow, including in the production of long distance drones, robots etc.

In Syria, the first legislative body of Syria, after the removal of President Assad, came into being. In late June, Israel conducted military operations in southern Syria in support of its forces in the area. According to the UN, over 1.5 million refugees and 1.8 million internally displaced persons have returned to their original habitations since end 2024 and the IOM reported a decline in population movement from Lebanon into Syria since the Israel-Lebanon ceasefire in mid April 2026. So, some hopeful signs of a return to normalcy except for the Israel dimension.

In Sudan, the humanitarian emergency worsened. Famine was formally declared in El Fasher and Kadugli, among other regions. Arbitrary detentions, enforced disappearances, and sexual violence were increasingly used as instruments of control by both the RSF and SAF. Sudan's economy has shrunk reportedly by around 40% since 2023. Sudan has effectively become a forgotten conflict in the midst of the ongoing churn in power balances in the region and the world.

In east DRC, the head of MONUSCO, James Swan, warned that the security situation in the east remains highly unstable and civilians continue to pay a heavy toll amid ongoing clashes in North and South Kivu and Ituri provinces. The outbreak of Ebola has further compounded the situation since it is happening in an area affected by active conflict. Swan called for the agreements signed for creating an agreed pathway to address the protracted conflict in Eastern DRC to be adhered to and commitments made by the signatories to be fully implemented. Regrettably, progress in this respect appears to be happening at snail's pace, if that.

The G7 Summit, hosted by France in Evian on 15-17 June, was an important milestone during the month. A combination of skilful diplomacy by President Macron and a somewhat subdued performance by President Trump enabled some useful consensus to emerge on several issues, even though the US commitment to

it cannot be guaranteed. PM Modi was among those invited for the outreach at the summit.

The G7 Leaders statement on geopolitical issues covered Ukraine, the Middle East, the Indo-Pacific and DPRK. Unwavering support for Ukraine was expressed, including for its winter energy requirements as also agreement to increase delivery of air defence capacities, long range capabilities etc. It remains to be seen who will do the heavy lifting on the latter. The EU commenced enlargement negotiations with Ukraine during the month.

The announcement of the US-Iran MOU was welcomed. It was reaffirmed that the right of transit passage without restrictions or tolls is the bedrock of international trade; the threat posed by Iran in the region and beyond must be addressed and it be assured that Iran never obtains a nuclear weapon. The G7 are committed to accelerate the diversification of energy supply routes to reduce global vulnerability to the Strait of Hormuz and to increase their energy stocks.

The reference to the importance of a free and open Indo-Pacific based on the rule of law is not without significance, notwithstanding the mixed signals from the US.

The Declaration on Mutually Beneficial International Partnerships needs particular mention. It recognises the need to update the current international development system whose architecture has become overly complex and needs to be rationalised. Concessional resources are to be strategically used; efforts made to enhance partners' long term economic sovereignty and resilience; efforts made to address escalating global debt vulnerabilities that threaten economic stability and constrain fiscal space for essential public service interventions; G7 will support more effective mobilisation of private capital to finance long term development and impact at scale; there will be promotion of supply chain resilience, and diversification, and resilient transportation, energy, and digital infrastructure in line with G20 principles; the MDBs will be made more effective and impactful to reforms, and will use concessional resources strategically where they are most needed, particularly in least developed and most vulnerable countries. These are very noble objectives, but the proof of the pudding will lie in the eating.

Prime Minister Modi made an important intervention at the G7 Summit. He did some plain speaking on the need for trust. He noted that in today's world, the importance of partnerships naturally increases, but these succeed only when trust is at their core. He stressed that today, the most important strategic asset is not any mineral, technology or market, but it is mutual trust. He made the point that the

world today does not suffer from a shortage of resources, but suffers from a shortage of trust and the future of our partnerships depends on building this trust. He went on to suggest that the true test of partnership is not what we build for others but what we enable others to build for themselves. The Global South, he said, has great expectations from the world community. They do not wish to merely be beneficiaries of global development, but want to be participants in it. PM Modi also noted that the conflict in West Asia had caused immense loss of life and property to India's partner countries in the region and that disruptions to maritime trade through the Strait of Hormuz had caused damage to the economies of the entire world. He underlined that it is a collective responsibility to secure the maritime routes that connect nations through global maritime trade and sea lanes must remain safe and seafarers, enabling them to carry out their work without fear. Several Indian seafarers were, he recalled, killed during the conflict.

Chinese President Xi Jinping paid an important visit to the DPRK on June 8-9, his first overseas visit in 2026. He last visited Pyongyang in June 2019. The intent clearly was to ensure that DPRK, which had of late shown signs of straying, remains firmly within Beijing's sphere of influence. This assumes significance for China in the context of ongoing changes in East Asia. China wishes to remain the DPRKs indispensable partner.

According to Xinhua, Xi stressed that his government's stand on highly valuing China-DPRK traditional friendship will not change; firm support for Kim Jong Un leading the DPRK socialist cause will not change. Nor, will China's commitment to safeguarding the shared interests of the two countries and preserving a favourable strategic environment, change.

To further develop the bilateral partnership Xi put forward four proposals: consolidate the foundation of political mutual trust and relations between the two parties should play an important guiding role in the development of bilateral ties; both sides should uphold the inheritance of friendship as a driving force and strengthen the bonds between their peoples; both should stay committed to delivering benefits to the people ; and both sides should uphold fairness and justice as a guiding principle to enrich the substance of strategic coordination.

Xi conveyed China's willingness to work with the DPRK to strengthen the alignment of development strategies and expand practical cooperation in areas such as economy and trade, agriculture, construction, science and technology, and healthcare. Kim conveyed the readiness of his government to work with China in

these sectors to help the DPRK people advance towards modernisation together with China.

Kim Jong Un reportedly conveyed appreciation for the important proposals put forward by Xi for the development of bilateral relations in the new era and noted that Xi's concept of a community with a shared future for humanity and the four major global initiatives proposed by him carried profound significance for promoting world peace and development. Kim described the bilateral relationship as unbreakable and said that Xi's visit was a complete success.

In his address at the 105th anniversary of the CPC on July 01, Xi Jinping highlighted that it took China only a few decades to complete the industrialisation process that developed countries had gone through for hundreds of years and created two miracles namely, rapid economic development and long-term social stability. In his opinion, the great rejuvenation of the Chinese nation is unstoppable. He posited that today the CPC leads the people to promote Chinese style modernisation, "creates a new form of human civilisation and expands the path for developing countries to modernise" and offers "Chinese wisdom, Chinese solutions and Chinese strength to solving major human problems". In his opinion, China under the leadership of the CPC is "recognised as a builder of peace, a contributor to global development and a defender of the international order". It has now become quite normal for Xi to project China's policies as a model for other countries; as a leader of the international community and a proposer of global reform initiatives with China at the core. China as a model is not necessarily a message that is gaining too much traction and Xi's four global initiatives are clearly self serving.

It was a busy month for Indian diplomacy and economic engagement as is July going to be. The effort was to continue to consolidate partnerships in the immediate and extended neighbourhood and in Europe to address the downsides of the war in Iran, work on improved energy security and defence arrangements, minimise the downsides of changed and uncertain US policies, the increasing use of supply chains by some as instruments of pressure and de facto blackmail, and to ensure the ability to take decisions in India's interests and defend its territorial integrity and sovereignty.

So far, India has managed the downsides of the Iran war with deft handling to minimise the negative domestic impact. Planning for a worse contingency appears to be in place.

The visit to India by the newly elected president of Myanmar from May 30 to June 3 was an important event. Myanmar is a critically important neighbour of India.

This was President U Min Aung Hlaing's first overseas trip after being elected. Prime Minister Modi and the President underlined the importance of strengthening bilateral cooperation, including trade and economic ties, defence and security, border management, development assistance and cultural exchanges. It was agreed to facilitate and enhance bilateral trade through the Rupee-Kyat mechanism. Support was conveyed also for greater cooperation in agro processing, petroleum, energy and the mining sector.

India reaffirmed its support for the sovereignty and territorial integrity of Myanmar. This is important in view of the ongoing civil war within Myanmar. Both sides underscored the importance of preventing the misuse of sovereign territory for activities inimical to their security interests. India was assured that Myanmar territory would not be permitted to be used against India's security interests.

India's developing partnership with the government in Naypyidaw does not prevent it from engaging with the rebels with a view to bringing about reconciliation between the warring parties.

The acting President of Venezuela Delcy Rodriguez paid a working visit to India, June 03-06. Venezuela has been and is currently an important source of energy imports for India and an important market for Indian products in Latin America. There are also cultural links. India has investments in Venezuela's energy sector.

Discussions during her visit focused on strengthening an energy partnership in all its aspects and broadening the economic partnership to mining, including critical minerals, animal husbandry, transportation, agricultural equipment, automotives and pharmaceuticals.

Venezuela reportedly looks at India as a preferred partner in the years ahead. It remains to be seen if under current US overlordship this will be allowed to happen.

Prime Minister Modi paid a successful visit to France on 14 June 2026. France is, for all practical purposes, India's most important interlocutor and strategic partner in Europe. This was evident during the visit.

President Macron and PM Modi expressed satisfaction at the excellent growth and depth of bilateral defence collaboration across all domains and agreed to further intensify it with focus on co-design, co-development and co-production of defence platforms and advanced technologies. They also reviewed progress under the Horizon 2047 Roadmap and exchanged views on how to further cooperate in matters pertaining to economic growth, technology and innovation, talent mobility, P2P and cultural exchanges. They agreed to set up a high-level mechanism to double bilateral trade within five years.

An Innovation Roadmap 2030 was adopted. To expand cooperation in AI, it was agreed to establish a Joint India-France AI Working Group. An Economic Security Dialogue was instituted. Another nine MOUs covering diverse areas of cooperation were entered into. The partnership stands to deepen, diversify and leverage technology and innovation.

Participation in the G7 summit enabled Prime Minister Modi to meet important world leaders on the sidelines. These included the Presidents of the EU Council and the EU Commission, the Presidents of USA and UAE, the PMs of Canada and UK and the Chancellor of Germany.

The meeting with President Trump took place on June 17. While commending Trump for his efforts to end the conflict in West Asia, Modi underlined the importance of maintaining freedom of navigation and unimpeded commerce in the Strait of Hormuz and the need to ensure the safety of sea farers. The two leaders reviewed progress achieved under the India-US COMPACT and also instructed their officials to work towards a balanced, mutually beneficial and commercially meaningful bilateral trade agreement at the earliest. They reaffirmed their commitment to further strengthening the India-US comprehensive global strategic partnership. It was a cordial interaction, notwithstanding the systematic bad mouthing by the US of India in recent months.

The meeting with Prime Minister Carney of Canada on June 16 was more than routine and reflected the systematic ongoing improvement in bilateral relations under Carney. A joint press release was issued which, inter-alia, highlighted the importance of bilateral resilient and reliable supply chains in strengthening global energy and food security; expressed satisfaction with the progress in negotiations towards a CEPA and reaffirmed their shared objective of concluding the negotiations in 2026; and agreement to launch negotiations on a General Security of Information Agreement to further deepen defence and security cooperation.

Alongside his visit to France, Prime Minister Modi also paid a state visit to Slovakia on June 15. This was the first ever visit by an Indian Prime Minister after Slovakia became independent in 1993. The two Prime Ministers agreed to elevate the bilateral relationship to a Comprehensive Partnership with the intention of strengthening existing cooperation mechanisms and finding new avenues for deepening cooperation both bilaterally and multilaterally. It was also agreed to strengthen defence and security cooperation as one of the key pillars of the partnership. Cooperation is also to be strengthened in the protection of critical information infrastructure and preventing and countering cyber crime. It was also agreed to conclude early a Social Security Agreement. This is important in the context of the mobility of working professionals.

The visit to Slovakia opens a new chapter in the relations with an important old partner, going back to when Slovakia was part of Czechoslovakia. It is an EU member state that has locational advantages; has niche technologies and a tradition of Indology that make it an useful partner.

PM Modi paid a landmark visit to the Seychelles, June 27-29 on the occasion of the fifty years of Seychelles independence and fifty years of the establishment of bilateral diplomatic relations. He had last visited in 2015, his first visit to an Indian Ocean country and Africa. He was received with great honour and dignity.

In February 2026, the President of Seychelles Dr. Patrick Herminie had paid a state visit to India at which time a Joint Vision for sustainability, economic growth and security through enhanced linkages had been adopted.

During his visit, PM Modi conveyed several important messages to the National Assembly of Seychelles and at the Joint Press Statement on June 28. Seychelles, he said occupies a special place in India's vision for the Indian Ocean; the Indian Ocean does not separate India and Seychelles but connects us; our commitment to one another has not changed and our cooperation in maritime security, capacity building, hydrography and maritime domain awareness reflects our shared commitment to a safe and secure region; our futures are interconnected and interdependent; Seychelles is not a small island state, but a Large Ocean country; India will work towards enhancing connectivity with Seychelles and share its successful digital public infrastructure with it.

PM Modi reaffirmed that India's development partnership with Seychelles will continue to be advanced by placing the priorities, needs and aspirations of Seychelles at its core. He expressed the belief that the defence and security of India

and Seychelles are inseparable, and we will continue our close cooperation in this regard.

Several concrete outcomes happened including gifting of one FPV, handing over of 10 utility vehicles and 5 sets of Laser Radial class boats, 500 MT of rice, 8500 MT of cement, upgradation of specific defence equipment, MOU on cooperation in space, Extradition treaty etc.

The important outreach to the Seychelles continues and must be sustained and strengthened.

The weeks ahead will require continued vigilance by India. The future of NATO will become clearer at the Ankara NATO Summit on July 7-8. This will have implications for the war in Ukraine. The ceasefire in the Iran war is due to end in the third week of August but US threats to resume military operations have become a regular feature that breed uncertainty. This too will have implications for managing India's energy and other needs. Israeli actions in Lebanon and Gaza are difficult to predict but presumably the US will not allow Israel to wreck a set of arrangements with Iran acceptable to it.

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