



Delhi Policy Group

Advancing India's Rise as a Leading Power

GLOBAL HORIZONS

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Cover Images:

1. PM Modi, President Xi and President Putin during the BRICS Summit, New Delhi on 12 September 2026. Source: [PIB](#)
2. President Trump and President Xi Jinping during Xi's visit to the US; September 24, 2026. Source: [The White House](#)
3. EAM S. Jaishankar delivering address at the UNGA, September 26, 2026. Source: [United Nations](#)

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by

Nalin Surie

It was a complex month with several strands of the current international security and economic dimensions simultaneously at play. The victors and beneficiaries of the post World War II order remain unwilling to give up their privileges and power to take into account contemporary realities and the direction in which the world is headed. Instead, they seek to maintain their privileges and through seemingly innocuous and high sounding initiatives, further bend international institutions to their purpose.

At the same time, the ongoing wars in Ukraine, over Iran, in Sudan etc., and earlier wars unleashed by the major powers late in the last century and during this century, clearly demonstrate that those with visions of using military force to achieve their objectives must recognise that this is unviable. That said, new forms of warfare and high tech and outer space capabilities are being developed to maintain military dominance. A new arms race is underway and the basic concepts of warfare are being rewritten. This adds to the dangers confronting the world, but interestingly also offer low cost but effective alternatives to those facing or in danger of being aggressed against.

On the other hand, the enormous interdependencies created during the recent period of globalisation have created pressure/choke points that countries can use against competitors, turning the focus on reducing dependencies and setting up shorter and dependable supply chains. China, the US and EU are at the forefront of this process. Not surprisingly, countries like India and others in the Global South are facing the heat. Security is the dominant vector and reduction/elimination of economic choke points is becoming the norm. However, reduction of dependencies takes time and this is impacting international trade and investment flows.

In the midst of the above trends and those that decry multilateralism, the High Level segment of the 81st UNGA held during the month demonstrated both the importance and usefulness of a multilateral institution such as the UN serving as the world's Town Hall and enabling free debate and the voicing of opinions on the problems besetting the international community, and allowing friends and foes to establish direct/indirect contact.

Of the G20 states, President Trump addressed the UNGA as did the Presidents of France, ROK, Brazil, Argentina, Turkey, South Africa, the Prime Ministers of UK, Japan and Australia, the Vice President of China and the Foreign Ministers of India,

Canada and Russia. More generally, a total of nearly 130 heads of state and government and other senior representatives spoke.

The theme for the high level segment was “Restoring trust, managing transformation: a UN that delivers for all”. The idea was to reduce the wide gap between the principles of the Charter and their application in practice. Without that the system continues to lose credibility and for that, the developing countries must be allowed to play a larger role in the making of international rules and laws. Evolution of the system must also recognise the growing salience of multipolarity, which is consistent with the provisions of the UN Charter and is underway through the development and evolution of plurilateral arrangements/organisations.

The challenge is to restore trust, legitimacy and representation in the UN system and its institutions. This will not be an easy task, and will require the Global South to activate its unity and capabilities if they are not to continue to lose out, including on the critical issue of AI.

President Trump’s policy moves continued to make waves during the month. An agreement was signed with Greenland and Denmark that sustains Danish sovereignty and territorial integrity and Greenland’s right to self determination, but allows the US virtually unfettered strategic and military access on a permanent basis and denies adversaries from establishing military facilities or sensitive strategic investments in the territory. The latter is presumably a reference to China, Russia, Iran and DPRK.

The US continued to mount pressure on Cuba through a continued oil/fuel blockade, economic sanctions etc. There was reportedly no dialogue but on September 26, President Trump said that an agreement between the two countries would be reached and he did not expect military action to be necessary. The intention was to “help Cuba” and “open Cuba up”.

The US dispute with Canada heated up. The economic relationship worsened, with Canada imposing on September 08 retaliatory tariffs on USD 20 billion of US goods as a dollar to dollar response to US actions. The US responded to this on September 29 by denying access to some Canadian products. This is expected to impact the long standing economic integration of the two countries. As a result, Canada continued to diversify its economic relations. In a significant move, the President of the EU Commission offered to welcome Canada as its first ever associate member. Trump threatened the EU with serious consequences if that were to happen. The defence relationship between the US and Canada, though, reportedly remained stable.

On the critical issue of how the mind boggling and very dangerous challenge of the technological revolution in AI is to be handled by the international community, President Trump has decided that the US, which is largely leading the race, will ensure that it remains ahead and will not let China take the lead and that it shall not regulate

its companies. He officially renamed AI as SI or Super Intelligence and in an agreement signed on September 28 with the heads of Google, Anthropic, Meta, OpenAI, XAI and Nvidia, the leaders in AI development, it was announced that subject to four self applicable layers of controls and audit, “every company is responsible for developing its own technology safely and in a way that builds trust with customers and the public”. The participating companies will meet regularly to establish standards and best practices to improve the safety of their systems. Over time, these steps could be codified into laws or regulations.

AI has become the principal focus in the race for strategic, technological and development competition and leadership in the months and years ahead. The Trump approach is likely to come into conflict with China, the EU, India/BRICS and the Global South, and could sabotage efforts to create a multilateral system to put AI at work for the greater good and economic development of the Global South and to ensure peace and stability in the world.

The war in Ukraine dragged on with no real territorial accretion by either side, but the devastation in Ukraine from Russian aerial attacks continued. Kiev was regularly targeted as were infrastructure facilities. The intention seems to be to destroy civilian morale and make the oncoming winter unbearable. Ukraine remains short of aerial defense systems. Ukraine, though, was not deterred and continued to launch long distance drone and other aerial attacks on Russian energy and other strategic targets which are hurting the adversary.

This war in Ukraine has already exceeded the duration of the former USSR’s involvement in WW II. Regrettably, the present US administration has shown little interest in helping end this debilitating war that has seriously disrupted the Eurasian security architecture. However, during the month, the special envoys of President Trump, Messrs. Witkoff and Kushner, for the first time, visited Kiev for discussions, after going to Moscow where they have been quite often. But from information in the public domain there has been no follow up, although the diplomatic initiative may resume in the coming weeks. Russia does not appear to be willing to make any serious concessions to bring about an end to the war. Europe continues to stand firmly with Ukraine but its ability to supply certain types of military equipment is limited. The destructive, bloody and debilitating stalemate unfortunately continues.

While the war goes on, problems related to supplies of food, fertiliser and energy persist and are negatively impacting international markets and the Global South in particular.

As regards Gaza, the West Bank, Lebanon and Syria, the situation in this important region remained unsettled and volatile.

At the UNGA, support for a two state solution for Palestine remained strong.

In Gaza, the ceasefire of last October remained in place but so did the violence. Israeli attacks continued and while the Board of Peace drew up an initial \$2.45 billion reconstruction program covering 66 projects, implementation could not proceed because of issues relating to disarmament of Hamas, deployment of the proposed international stabilisation force etc.

On the West Bank, Israel continued the building of settlements, including in a manner that would negatively impact the territorial connection between the north and south of the West Bank and the relationship between East Jerusalem and the rest of the territory. Also, settler violence continued.

In Lebanon, the stand off between Israel and Hezbollah continued and prevented the proposed withdrawal of Israeli forces from southern Lebanon. Negotiations under US auspices to break the stalemate over the Israeli withdrawal and disarmament of Hezbollah are scheduled for October.

Speaking at the UNGA, Syrian President al-Sharaa attempted to project that Syria was on the path of normalisation and reconstruction. The UN has assessed that Syria has made “important advances” in its political transition but needs to establish accountable institutions, broader political participation, transitional justice etc. Kurdish integration remained a work in progress.

Tensions continued over Israel’s military activity in southern Syria. While al-Sharaa reiterated Syria’s claim to the Golan Heights, the Israeli Defence Minister reiterated that the Heights were an inseparable part of Israel.

The war in Iran went through several phases during the month, starting with a military escalation early in the month by US attacks on Iranian air defence, radar and maritime targets, reportedly after threats to US forces etc. Iran retaliated, including against US bases in Kuwait, Jordan and UAE. Attacks were exchanged on shipping in the Strait of Hormuz. Further, the US intensified economic sanctions on Iran to reduce its ability to trade and generate resources.

On September 09, the IAEA Board of Governors voted to refer Iran to the UNSC but on September 17 Russia and China blocked the proposal for renewing the independent UN panel for monitoring sanctions against Iran.

During the UNGA, efforts were made to indirectly engage with the US through Qatar. The Iranian FM’s proposal for a ceasefire was turned down by the US. The Iranian President said Iran would not give in to US pressure but was open to negotiations. President Trump said the US retained the military option.

In effect, the military stalemate in Iran continued. Iran has demonstrated that it is not only no pushover militarily but can inflict unacceptable damage on both US forces and on US allies in the region. Nevertheless, the US blockade of the Strait of Hormuz

has seriously impacted the movement of oil from Iran with obvious economic implications. At the same time alternative pipeline routes have opened up for other suppliers. Also, the US has had some success in escorting vessels through the Strait. It has been reported on October 01 that the flow of oil from the Gulf has reached the pre-Iran war level. But this has come at a higher price on account of the additional costs and risks involved.

It is being speculated that in view of the inability of the US to impose a military solution on Iran, the US focus is now on exercising severe economic pressure on it to make it conform. This may, however, change post the mid term elections in the US. President Trump has argued that post those elections, Iran will seek a settlement or face military action. Uncertainty continues to reign.

Military actions by the Houthis, allies of Iran, during the month have added to the complexities and challenges facing the region after the US/Israel attacks on Iran, especially for Saudi Arabia. The Houthi effort is to establish territorial control over Yemen's western coastline and the approaches to Bab al-Mandeb Strait. For this purpose, they seized Mocha and moved southward towards the Strait. In an effort to increase their control in Yemen, they also enhanced their attacks on Saudi forces within Yemen and in Saudi Arabia. In effect, they had a dual objective. The civil war in Yemen is, willy nilly, becoming a part of the quagmire following the US/Israel attacks on Iran.

In an effort, perhaps to reassure international shipping, the Houthis announced that their naval blockade was against Saudi Arabian vessels and that other commercial shipping and navigation remained safe. The Europeans were reportedly assured that their shipping would not be targeted. The UN assessed that as of mid-September, commercial shipping through the Red Sea had not yet been substantially interrupted.

It remains to be seen how Saudi Arabia will react to the Houthi actions. Media reports suggest that President Trump had turned down Saudi requests for military assistance against them. There is also no concrete information on whether there is any move for the participants of the newly minted Makkah Agreement to get involved against the Houthis.

Uncertainty continues to haunt the Gulf and its adjacent region, with a direct and negative impact on international trade, energy supplies and peace & security in the region. On September 30, US and British forces finally withdrew from Iraq. Operation Inherent Resolve that began in 2014 has ended. Will this play to Iran's advantage? This introduces another factor in the basket of uncertainty.

India successfully hosted the 18th BRICS Summit in New Delhi on September 12-13. Extensive year long preparatory work had been carried out across the areas of cooperation identified/proposed for enhancing cooperation and enhancing the profile

of this plurilateral gathering of countries that is focussed on trying to address the growing and identified infirmities in the systems of international governance and development from the perspective of developing countries. It is not anti-West.

The New Delhi Declaration was adopted by consensus. Four of the five founding members attended at the highest level. President Lula of Brazil could not attend on account of imminent Presidential elections in his country.

India's focus as host was on the Global South and issues covered included reform of global governance; greater representation of developing countries in international institutions; sustainable development; AI; technology and innovation; development finance; health; food and energy security and capacity building.

Prime Minister Modi underlined that it was now time for the global South to become 'rule shapers', and not simply 'rule takers'. This will not be easy, but the journey cannot be postponed indefinitely.

It was agreed, inter alia, that there should be greater use of national currencies for trade and investment; for greater interoperability of payment and messaging systems; expansion of local currency financing; strengthening of the BRICS New Development Bank; and working towards a BRICS economic partnership strategy for 2030. Strengthening of the NDB can concretely help in providing development finance to its members and other developing countries.

Stress was placed on Technology and AI. In the latter context, the call is, inter alia, for equitable and inclusive access to AI alongside safety and security; trustworthy AI; use of AI for sustainable development; and greater participation of the GS in AI governance. Given the international state of play in AI referred to earlier, this is not going to be an easy do or ask. The heavy lifting will have to be done by China, India, Russia and Brazil. Will collaboration among them be forthcoming or will China want to be the rule maker? Time will tell, but India must single mindedly further hone its not insignificant capabilities in this critical technology for the future.

India's MEA identified 50 concrete outcomes of the New Delhi summit. It remains to be seen how many of these will be pursued by the next Chair of BRICS, China. This is relevant since BRICS does not have an established Secretariat that is responsible for follow up. Regardless, it bears recalling that good ideas have a life of their own.

On the sidelines of the BRICS Summit, an important structured meeting was held between PM Modi and President Xi Jinping of China on September 12. Prior to this, the Special Representatives on the boundary question had met in Beijing on August 25.

After the Modi-Xi meeting, both sides issued their own press releases on the talks. The differences in perspective are clear in this set of statements.

The talks were clearly candid and repeated known positions.

China wants India to recognise, said Xi, that the two countries have different national realities; that the direction of the development of bilateral relations must be calibrated with an objective and rational strategic perception; that the judgement that the two are partners rather than rivals and offer development opportunities rather than threats to each other is a strategic judgement based on the development stage and international environment of the two countries; and that the two sides should stay committed to advancing bilateral relations and resolving the boundary question, seek 'parallel', mutually reinforcing progress, and maintain peace and tranquility in the border areas.

PM Modi for his part stressed that the two countries must be guided by mutual respect, mutual sensitivity, and mutual interest; that peace and tranquility in the border areas remains an essential basis for the continued development of bilateral relations and the need for both sides to observe existing agreements and understandings on border related issues. He conveyed the Indian position that on economic and trade relations, there is need to address each other's concerns, including on a structural trade imbalance and supply chain issues along with facilitation of meaningful and predictable market access. The Chinese response was that the two sides should also address each other's economic and trade concerns in a 'balanced' way, and promote the sound and steady development of economic and trade relations.

Chinese President Xi Jinping paid a state visit to Washington, DC from September 23-25. The visit was heavy on pageantry and light on substance, although it can be argued that the very fact of the visit at this level happening between the leaders of the world's two biggest and closely intertwined economies, and which are on opposing sides of the spectrum on the wars in Ukraine and Iran, is in itself a matter of substance. Also, that each considers the other its principal conventional military threat.

Xi chose not to address the High Level segment of the UNGA debate in New York during his visit.

Outcomes were pre-negotiated and modest (e.g. on trade and investment) but clearly for both Trump and Xi, the event was important enough. Reasons for this can be speculated upon, but there is little doubt that it serves both sides to keep their very serious cross sectoral competition and threat perceptions of each other in check. Xi again reminded Trump during their talks that the two countries should coexist in peace as two major countries and reiterated that "the Thucydides Trap can be overcome".

The pomp and the pageantry will go down well for Xi back home, as also the impression of equality with the US. Like all others, China too awaits the results of the

midterm elections in the US later this year with great interest. Xi is to meet Trump twice again before the year is out, at the G20 summit in the US (December) and earlier at the APEC summit in China (November). Both have committed to attending each other's summits. Opportunities for more substantive outcomes are thus available in the near future, especially once the political situation in the US Congress is clear.

President Trump's motivations, though, are less clear. Was this a clever feint to deceive or is the US genuinely willing to cede some ground to China going ahead? He made no concession on AI, except a dialogue, a matter of very great interest to China. Trump also told the media that the US intends to maintain its lead on AI over China. The US has reiterated that 'the constructive relationship of strategic stability' with China has to be on the basis of 'respect, fairness and reciprocity'. He reportedly advocated trilateral arms control negotiations among the US, Russia and China. This is anathema to China.

The US-China tango continues. Except that under President Trump, you never know when the music will change or stop.

India's national statement at the 81st UNGA was delivered by External Affairs Minister S. Jaishankar. He warned that even as we meet, conflicts and confrontations remain our primary preoccupation; that countries far from conflicts are being penalised for no fault of their own; and that if the world is subjected to continuous threats and pressures, then we are really living at the edge of an abyss. Further, we are seeing the weaponisation of everything and the overall atmosphere is no longer one of trust or goodwill. This has to change. Each UN member must play its part.

India's contributions were highlighted, including cooperation in AI constituting part of its partnership with the GS.

The persistent threat to peace from terrorism was recalled as was India's continuing right to defend itself from it, a right that would be exercised.

Jaishankar noted that we are well on the way to a multipolar world but warned that the process of adjustment, accommodation and acceptance towards that will not be easy. The case for reformed multilateralism too was getting stronger by the day. There was need for universal commitment to peace, development and prosperity.

The world remains an uncertain and dangerous place. There is no option for India but to build strength and resilience and focus on comprehensive national development.



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