



Delhi Policy Group

Advancing India's Rise as a Leading Power



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Author

Lalit Kapur

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Core 5A, 1st Floor, India Habitat Centre, Lodhi Road, New Delhi- 110003

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INDO-PACIFIC MONITOR

This publication is a monthly analytical survey of developments and policy trends that impact India's interests and define its challenges across the extended Indo-Pacific maritime space, which has become the primary theatre of global geopolitical contestation. It is authored by Cmde. Lalit Kapur (Retd.), DPG Senior Fellow for Maritime Strategy, assisted by Ms. Divya Rai, Research Associate, based on open source reports and publications. Your comments and feedback may be addressed to the author at lalit@dpg.org.in. To subscribe, please [click here](#).

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Cover Images:

1. US Defense Secretary James Mattis with the Outgoing Commander at the Change-of-Command ceremony for the Indo-Pacific Command, May 30, 2018. Source: US Department of Defense
2. Vice President Vance at the Lake Lucerne Summit in Switzerland on June 21, 2026. Source: Vice President JD Vance
3. Raksha Mantri Shri Rajnath Singh and Australian Deputy Prime Minister & Minister for Defence Mr Richard Marles ahead of the second India-Australia Defence Ministers' Dialogue, New Delhi on June 01, 2026. Source: PIB

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INDO-PACIFIC MONITOR

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Abstract

In this issue, the author analyses developments presaging far-reaching changes in regional security arrangements to the East and West of the Indian Ocean. To the East, INDO-PACOM reverted to its earlier name of PACOM, bringing to an end an eight-year experiment that had begun under the previous Trump administration, and signalling de-hyphenation of the Pacific and Indian oceans in US strategic planning. To the West, the failure of the US to defend even its own bases, leave alone vital infrastructure of its allies and partners in the Gulf, and the Iran-US MoU of June 17, portends the development of new security arrangements for the region.

Prime Minister Narendra Modi visited Seychelles from June 27-28, consolidating India's and Indian Ocean maritime security.

PM Modi met US President Donald Trump on the sidelines of the G7 summit on June 17, their first meeting in 16 months, marking an attempt by both sides to reset their relationship.

The second India-Australia Defence Ministers' Meeting took place in New Delhi on June 01. Defence engagement between the two sides continues to grow, with more developments expected when PM Modi visits Australia in July 2026.

Exercise RIMPAC began off Hawaii on June 24. The absence of a warship from India, for the first time since 2014, was noticeable.

Media reports indicated that the US is developing plans to buy the Chagos Islands, including Diego Garcia, from Mauritius.

PM Modi commissioned three Indian Naval ships, a stealth frigate, an ASW Shallow Water Craft and a survey ship, in Kolkata on June 21.

INDO-PACOM Reverts to PACOM

Even as the Quad faltered¹, the Indo-Pacific construct received a jolt with the US Department of War announcing on June 16, 2026, that the US Indo-Pacific Command (USINDOPACOM) had officially restored its name to US Pacific Command (USPACOM)². The change brought an end to the eight-year old experiment that began in May 2018 under the first Trump administration.

The Quad partners were among the first countries to adopt the Indo-Pacific as a construct. Japan's Shinzo Abe elucidated his "Democratic Security Diamond" in 2012³, explicitly stating that "peace, stability and freedom of navigation in the Pacific Ocean are inseparable from peace, stability and freedom of navigation in the Indian Ocean". He also wrote of the need for the Indian and Japanese governments to join together to shoulder more responsibility as guardians of navigational freedoms in the two oceans, and posited a strategy whereby Australia, India, Japan and the US state of Hawaii formed a diamond to safeguard the maritime commons stretching from the Indian Ocean to the Western Pacific. His concept served as the hard security, balance-of-power blueprint for his Free and Open Indo-Pacific strategy unveiled in Kenya in 2016⁴. Australia adopted the Indo-Pacific in its 2013 Defence White Paper and followed up with improving relations with India⁵.

The Indo-Pacific entered the US strategic lexicon with President Trump's speech at the APEC Summit at Da Nang in November 2017⁶. Two days later, Foreign Ministry officials from the Quad countries (including India) met at Manila on the sidelines of the 12th East Asia Summit and agreed that a free, open, prosperous and inclusive Indo-Pacific region serves the long-term interests of all countries in the region and of the world at large⁷. The US National Security Strategy of December 2017 made the Indo-

¹ See Lalit Kapur, "A Reprieve for the Quad?", DPG Policy Brief Volume XI, Issue 16, June 13, 2026, https://www.delhipolicygroup.org/storage/uploads/publications_file/publication-1781333712-dpg-policy-brief-xi-issue-16pdf.pdf

² Department of War Restores US Pacific Command Designation, June 16, 2026, <https://www.pacom.mil/Media/Press-Releases-and-Readouts/Article/4519249/departement-of-war-restores-us-pacific-command-designation/>

³ Shinzo Abe, "Asia's Democratic Security Diamond", December 27, 2012, <https://www.project-syndicate.org/onpoint/a-strategic-alliance-for-japan-and-india-by-shinzo-abe>

⁴ Address by Prime Minister Shinzo Abe at the Opening Session of the Sixth Tokyo International Conference on African Development (TICAD VI), August 27, 2016, https://www.mofa.go.jp/afr/af2/page4e_000496.html

⁵ Defence White Paper 2013, <https://www.globalsecurity.org/military/library/report/2013/australia-wp-2013.pdf>

⁶ Remarks by President Trump at APEC CEO Summit, Da Nang, Vietnam, November 10, 2017, <https://trumpwhitehouse.archives.gov/briefings-statements/remarks-president-trump-apec-ceo-summit-da-nang-vietnam/>

⁷ India-Australia-Japan-US Consultations on Indo-Pacific, November 12, 2017, https://mea.gov.in/press-releases.htm?dtl/29110/IndiaAustraliaJapanUS_Consultations_on_IndoPacific_November_12_2017

Pacific its primary regional focus⁸, while the US National Defense Strategy of January 2018 identified China, using military modernisation, influence operations and predatory economics to coerce neighbouring countries to re-order the Indo-Pacific region to its advantage, as the primary strategic challenger⁹. India, which had accepted the Indo-Pacific as a construct in the Quad Officials meeting in 2017, elaborated on its Indo-Pacific vision in June 2018 with Prime Minister Narendra Modi's keynote address at the Shangri-La Dialogue¹⁰. His address made clear that while India was for the Indo-Pacific, it did not envisage the construct as a return to the age of great power rivalry.

Building on the Indo-Pacific construct, US Secretary of Defense James Mattis renamed the US Pacific Command as the US Indo-Pacific Command on May 30, 2018¹¹. Three days later, Mattis spoke on the US Indo-Pacific strategy at the Shangri-la dialogue, highlighting the US objective that no one nation should dominate the Indo-Pacific¹². He identified four themes of the US strategy to ensure this did not happen: expanded attention on the maritime space, increased interoperability with allies and partners, strengthening the rule of law, civil society and transparent governance, and private-sector-led economic development. He particularly highlighted India's role as a leader and responsible steward in the Indo-Pacific region and the US focus in strengthening the partnership with India. Asked about the significance of the change of name, he reflected on the growing significance of the Indian Ocean and of India, and said he wanted to make certain that the name of the command actually reflects the changed reality.

However, the new name did not alter the reality that operational responsibility for the Indian Ocean was divided between three US Combatant Commands, reflecting the low priority accorded to the Indian Ocean in US strategic thought. The Area of Responsibility (AOR) of the Pacific Command in the Indian Ocean had historically been defined as that part of the ocean lying east of the meridian running through India's border with Pakistan. This did not change: INDOPACOM had no role to play in the Western Indian Ocean, which was divided between the US Central Command

⁸ National Security Strategy of the United States of America, December 18, 2017, <https://trumpwhitehouse.archives.gov/wp-content/uploads/2017/12/NSS-Final-12-18-2017-0905.pdf>

⁹ Summary of the 2018 National Defense Strategy of the United States of America, January 2018, <https://media.defense.gov/2020/May/18/2002302061/-1/-1/1/2018-NATIONAL-DEFENSE-STRATEGY-SUMMARY.PDF>

¹⁰ Prime Minister's Keynote Address at Shangri La Dialogue, June 01, 2018, http://mea.gov.in/Speeches-Statements.htm?dtl/29943/Prime_Ministers_Keynote_Address_at_Shangri_La_Dialogue_June_01_2018

¹¹ Remarks at the US Indo-Pacific Command Change of Command Ceremony, May 30, 2018, <https://www.war.gov/News/Transcripts/Transcript/Article/1535689/remarks-at-us-indo-pacific-command-change-of-command-ceremony/>

¹² Remarks by Secretary Mattis at Plenary Session of the Shangri-La dialogue, June 2, 2018, <https://www.war.gov/News/Transcripts/Transcript/Article/1538599/remarks-by-secretary-mattis-at-plenary-session-of-the-2018-shangri-la-dialogue/>

and the Africa Command. CENTCOM bore responsibility for the area north of Somalia's border with Kenya, while AFRICOM was responsible for the southwestern Indian Ocean, including the island nations off Africa.

This was at odds with India's concept of the Indo-Pacific encompassing the entire Indian Ocean. The US Deputy National Security Adviser, Matt Pottinger, did assert at the Raisina Dialogue in 2020 that differences between India and the US on the geographical extent of the Indo-Pacific had been reconciled and that the Indo-Pacific extended from "California to Kilimanjaro" (instead of the earlier Hollywood to Bollywood)¹³, but these words were not supported by any revision in the AORs of the combatant commands. Nor was India's aversion to the return of great power rivalry vis-à-vis the other Quad partners desire to balance China addressed.

A multitude of Indo-Pacific strategies/outlooks followed. France adopted the Indo-Pacific in President Macron's speech at Garden Island in May 2018, describing Australia and India as its critical partners in a new Indo-Pacific alliance and axis¹⁴. His speech provided the foundations for the first French Indo-Pacific Strategy of 2019¹⁵, which was revised in 2022¹⁶ and 2025¹⁷. ASEAN adopted its outlook on the Indo-Pacific in July 2019¹⁸. Germany published policy guidelines for the Indo-Pacific in September 2020¹⁹. The Netherlands followed suit the same month²⁰. The UK tilted towards the Indo-Pacific in March 2021²¹. The EU published its strategy for cooperation in the Indo-Pacific in September 2021²². Italy followed in January 2022²³,

¹³ Principal Deputy Assistant Secretary of State for South and Central Asian Affairs Alice Wells, Special Briefing, January 24, 2020, <https://2017-2021.state.gov/principal-deputy-assistant-secretary-of-state-for-south-and-central-asian-affairs-alice-wells/>

¹⁴ Speech of the President of France at the Sydney Naval Base, Garden Island, May 03, 2018, <https://www.elysee.fr/emmanuel-macron/2018/05/03/discours-a-garden-island-base-navale-de-sydney> For a transcript, see <https://www.geopoliticalcartographer.com/wp-content/uploads/2025/01/Speech-of-the-President-of-France-at-the-Sydney-Naval-Base.pdf>

¹⁵ France's Indo-Pacific Strategy, https://www.diplomatie.gouv.fr/IMG/pdf/en_a4_indopacifique_synthese_rvb_cle068e51.pdf

¹⁶ France's Indo-Pacific Strategy, https://www.diplomatie.gouv.fr/IMG/pdf/en_dcp_a4_indopacifique_022022_v1-4_web_cle878143.pdf

¹⁷ France's Indo-Pacific Strategy, https://www.diplomatie.gouv.fr/IMG/pdf/france_s_indo-pacifique_strategy_2025_cle04bb17.pdf

¹⁸ ASEAN Outlook on the Indo-Pacific, https://asean.org/wp-content/uploads/2021/01/ASEAN-Outlook-on-the-Indo-Pacific_FINAL_22062019.pdf

¹⁹ Policy Guidelines for the Indo-Pacific, https://asean.org/wp-content/uploads/2021/01/ASEAN-Outlook-on-the-Indo-Pacific_FINAL_22062019.pdf

²⁰ Indo-Pacific: Guidelines for Strengthening Dutch and EU Cooperation with Partners in Asia, <https://worldjpn.net/documents/texts/FOIP/20201100.O1E.html>

²¹ The UK's tilt to the Indo-Pacific and what's next for its policy to the region, <https://researchbriefings.files.parliament.uk/documents/CBP-10052/CBP-10052.pdf>

²² The EU Strategy for Cooperation in the Indo-Pacific, September 16, 2021, https://eeas.europa.eu/sites/default/files/jointcommunication_2021_24_1_en.pdf

²³ The Italian Contribution to the EU Strategy for the Indo-Pacific, https://www.esteri.it/wp-content/uploads/2022/02/THE_ITALIAN_CONTRIBUTION_TO_THE_EU_STRATEGY_FOR_THE_INDO_PACIFIC.pdf

as did the Czech Republic in November 2022²⁴. The Indian Ocean Rim Association adopted its Indo-Pacific Outlook in November 2022²⁵, as did Canada²⁶. South Korea published its Indo-Pacific Strategy in December 2022²⁷. Bangladesh published its official outlook on the Indo-Pacific in April 2023. Even Lithuania published its Indo-Pacific strategy in July 2023²⁸. The focus of all these strategies and outlooks, however, was largely economic, seeking ways to engage with the world's fastest growing region, without much attention to the security underpinnings required.

Meanwhile, Washington DC moved to make India a core partner for regional stability, technological development and manufacturing capability. India completed signing on to all the 'foundational agreements', was designated a Major Defense Partner (MDP) and was accorded Strategic Trade Authorisation Tier-1 (STA-1) status. Bilateral Foreign and Defence Ministerial 2+2 meetings began in September 2018²⁹. The global partnership of 2005³⁰ between the two countries was upgraded to a Comprehensive Global and Strategic Partnership during the visit of President Trump to India in February 2020³¹; strategic convergence in the Indo-Pacific was a key element of this partnership. The Obama era Defence Technology and Trade Initiative (DTTI) was replaced by the initiative on Critical and Emerging Technology (iCET), which subsequently evolved into TRUST (Transforming the Relationship Utilising Strategic Technology), and INDUS-X (India-US Defence Acceleration Ecosystem). The India-US COMPACT (Catalysing Opportunities for Military Partnership, Accelerated Commerce and Technology) and ASIA (Autonomous Systems Industry Alliance) followed. India positioned a Liaison Officer in the Indo-Pacific Command in late 2018, and in the Central Command in 2020. The 10 year Defence Framework agreement was extended in October 2025³².

²⁴ The Czech Republic's Strategy for Cooperation with the Indo-Pacific, https://mzv.gov.cz/file/4922486/CZ_Strategy_Indo_Pacific_2022.pdf

²⁵ IORA's Outlook on the Indo-Pacific, <https://www.iora.int/sites/default/files/2024-03/indo-pacific-outlook.pdf>

²⁶ Canada's Indo-Pacific Strategy, <https://www.international.gc.ca/transparency-transparence/indo-pacific-indo-pacifique/index.aspx?lang=eng>

²⁷ Strategy for a Free, Peaceful and Prosperous Indo-Pacific Region, December 2022.

²⁸ For a Secure, Resilient and Prosperous Future: Lithuania's Indo-Pacific Strategy, <https://www.urm.lt/storage/main/public/uploads/2024/02/eng-strategy.pdf>

²⁹ Joint Statement on the Inaugural India - US Inaugural 2+2 Dialogue, September 06, 2018, https://www.mea.gov.in/bilateral-documents.htm?dtl/30358/Joint_Statement_on_the_Inaugural_IndiaUS_2432_Ministerial_Dialogue

³⁰ Joint Statement, India-US, July 18, 2005, https://www.mea.gov.in/bilateral-documents?dtl/6772/Joint_Statement_IndiaUS

³¹ Joint Statement: Vision and Principles for India-US Comprehensive Global Strategic Partnership, February 25, 2020, https://www.mea.gov.in/bilateral-documents?dtl/32421/Joint_Statement_Vision_and_Principles_for_IndiaUS_Comprehensive_Global_Strategic_Partnership

³² Fact Sheet: Framework for the US-India Major Defense Partnership, October 31, 2025, <https://media.defense.gov/2025/Nov/13/2003820236/-1/-1/1/FACT-SHEET-FRAMEWORK-FOR-THE-US-INDIA-MAJOR-DEFENSE-PARTNERSHIP.PDF>

Notwithstanding the US renaming of PACOM as INDOPACOM and acceptance of the Indian and Pacific Oceans as one interconnected system, the position of the Indian Ocean in US strategic discourse remained peripheral. NSS 2017 explicitly supported India's leadership role in Indian Ocean security³³, possibly the only time after World War II that the US conceded leadership in any maritime region to another country. The focus of the Indo-Pacific Command in terms of building of regional relations, upgradation of military infrastructure, deployment of ships and aircraft, and training and exercises, remained the Western Pacific. Its major activities in the Indian Ocean included the USS John Paul Jones FONOP in the Lakshadweep directed against India in April 2021³⁴; Exercise Tiger Triumph (in November 2019, October 2022, March 2024 and April 2025) and Exercise Malabar (in 2020 and 2024). The objective of renaming (among other actions) was never for the US to play a greater role in Indian Ocean security. It was to draw India into playing a greater role in the Pacific while stepping up on its responsibilities in the Indian Ocean Region.

Notably, Secretary Pete Hegseth delinked the Indian and Pacific Oceans in his address at the 23rd Shangri-La Dialogue, emphasising only the Pacific. The term Indo-Pacific did not figure even once in his address. In speaking of increased US focus in deterring China and expectations from Pacific allies, he mentioned India last, noting only that it was modernising its military to carry its share of the security burden, particularly in the Indian Ocean³⁵. The reality is that while the Pacific and regional allies of the US are central to building deterrence against China; India and the Indian Ocean are not. The reversion of name from the Indo-Pacific Command to the Pacific Command reflects this reality, even if the Indo-Pacific has not completely been abandoned, as is evident from the stated US aspiration of encouraging India to play a greater role in Indo-Pacific security, and of continuing Quad cooperation³⁶.

That aspiration remains: NSS 2025 explicitly seeks to "improve commercial (and other) relations with India to encourage New Delhi to contribute to Indo-Pacific security"³⁷. The prioritisation of commercial relations, and the implicit downgrading of defence relations, a foundational pillar of the India US strategic partnership, indicates acknowledgement that India's focus has not expanded beyond the Indian

³³ National Security Strategy of the United States of America, December 18, 2017, <https://trumpwhitehouse.archives.gov/wp-content/uploads/2017/12/NSS-Final-12-18-2017-0905.pdf>

³⁴ For an overview, see Lalit Kapur, "Reading the USS John Paul Jones FONOP Right", DPG Policy Brief Volume VI, Issue 13, https://www.delhipolicygroup.org/public/storage/uploads/publications_file/reading-the-uss-john-paul-jones-fonop-right-2291.pdf

³⁵ Remarks by Secretary of War Pete Hegseth at the 2026 Shangri-La Dialogue in Singapore (As Delivered), May 30, 2026, <https://www.war.gov/News/Speeches/Speech/Article/4504755/remarks-by-secretary-of-war-pete-hegseth-at-the-2026-shangri-la-dialogue-in-sin/>

³⁶ See Lalit Kapur, "A Reprieve for the Quad", DPG Policy Brief Volume XI Issue 16, June 13, 2026, https://www.delhipolicygroup.org/storage/uploads/publications_file/publication-1781333712-dpg-policy-brief-xi-issue-16pdf.pdf

³⁷ National Security Strategy of the United States of America, November 2025, <https://www.whitehouse.gov/wp-content/uploads/2025/12/2025-National-Security-Strategy.pdf>

Ocean; expecting it to play a military role in the Pacific is unrealistic. Reversion of the name of the Indo-Pacific Command to the Pacific Command is merely continuance of this acknowledgement.

A changed US approach towards the regional security architecture is evident. The US nominally shifted its primary focus to the Western Hemisphere in NSS 2025³⁸, but the Pacific remained its strategic priority. American effort in the region shifted from constraining China to building “a constructive relationship of strategic stability on the basis of fairness and reciprocity”³⁹. America’s declaratory ambition is to ensure that the Indo-Pacific is not dominated by China or any other power, but it has changed its military focus to building, posturing and sustaining a strong denial defence along the First Island Chain⁴⁰. The Indian Ocean does not figure in the objectives given by the US Department of War to the concerned US combatant command.

The 30th edition of Exercise RIMPAC 2026 began off Hawaii on June 24⁴¹. Although India is listed as a participating country⁴², there are no reports of an Indian warship taking part. An Indian warship has been present for all editions of RIMPAC since 2014. Its absence this year points to a re-evaluation of India’s engagement with the US Pacific Command.

Does the change of name make a difference to India? Pakistan and China have projected it as a downgrading of India in the US strategic calculus, and there is indeed an element of downgrading India in the Pacific’s regional security architecture, eroding the aspiration of mutual support in ensuring region-wide stability across the Indo-Pacific. A reshaping of the Western Pacific security architecture is already evident. Will this impact India’s bilateral relationships with Indo-Pacific partners who are also US allies? Will it de-hyphenate the Indian and Pacific Oceans, effectively isolating India from the Western Pacific again, or is the impact limited to the US? How will it impact India’s Act East Policy? An indication of the answers to these questions may come from the forthcoming visit of Japanese Prime Minister Sanae Takaichi to India⁴³ and the visit of Prime Minister Narendra Modi to Australia for the annual leaders’ summits, both in early July 2026.

³⁸ Ibid.

³⁹ Fact Sheet: President Donald J. Trump Secures Historic Deals with China, Delivering for American Workers, Farmers, and Industry, May 17, 2026, <https://www.whitehouse.gov/fact-sheets/2026/05/fact-sheet-president-donald-j-trump-secures-historic-deals-with-china-delivering-for-american-workers-farmers-and-industry/>

⁴⁰ Department of War 2026 National Defense Strategy, <https://media.defense.gov/2026/Jan/23/2003864773/-1/-1/0/2026-NATIONAL-DEFENSE-STRATEGY.PDF>

⁴¹ 30th RIMPAC Kicks off in Hawaii, June 24, 2026, <https://www.war.gov/News/Feature-Stories/Story/Article/4525360/30th-rimpac-kicks-off-in-hawaii/>

⁴² Participants, <https://www.cpf.navy.mil/About-Us/Exercises-Missions/RIMPAC/Participants/>

⁴³ 16th India-Japan Annual Summit (1-3 July 2026; New Delhi), June 26, 2026, https://www.mea.gov.in/press-releases?dtl/41361/16th_India_Japan_Annual_Summit_13_July_2026_New_Delhi

Core responsibility for the Indian Ocean will still remain with India. US PACOM activities in the Indian Ocean will remain limited as before. The challenge for India's strategic planners will be to maintain and step up the bilateral relationships they have crafted over the years with Japan and Australia, in support of India's core interests in the Indian Ocean, without submitting to the US aspiration for India's greater involvement in Pacific stability.

The Iran US MoU

Having failed to break Iran's resolve through kinetic action followed by a blockade, US President Trump perforce turned to negotiation to break the continuing impasse with Iran. He and Iranian President Masoud Pezeshkian digitally signed the Islamabad Memorandum of Understanding on June 17⁴⁴, setting out a 60-day framework to cease hostilities, open the Strait of Hormuz and negotiate long-term nuclear safeguards. The MoU was widely seen as the US abandonment of its objectives in starting the conflict.

Delegations from the two countries gathered in Bürgenstock, Switzerland, to establish technical committees addressing the specifics of the MoU. The initial high-level phase of these negotiations, led by US Vice-President JD Vance and Iranian Parliament Speaker Mohammad Bagher Ghalibaf, concluded on June 22; technical expert teams in four working groups (sanctions termination, nuclear affairs, Iran reconstruction and economic development, and monitoring and implementation) were expected to reassemble end June to work out details for a final peace deal within the agreed 60-day period. These negotiations were, however, called into doubt following tit-for-tat strikes between the two countries over terms for the usage of the Strait of Hormuz. Iran is reported to have said on June 29 that no negotiations with the US are scheduled at any level in the coming days⁴⁵.

At least seven areas remain where negotiating positions of the two sides are widely divergent and negotiators will struggle to bridge the gap. These are the conflict between Israel and the Hezbollah in Lebanon; restoration of status quo in the Strait of Hormuz; the nuclear dispute; the lifting of sanctions; reconstruction and development of Iran; the continued threat from Iran's missiles and drones; and Iran's support to violent armed proxies. The status of these issues is contained in the succeeding paragraphs.

⁴⁴ A Look at the Text of the Agreement Between the United States and Iran, June 17, 2026, <https://www.nytimes.com/2026/06/17/us/politics/us-iran-agreement-deal-text.html>

⁴⁵ 'No negotiation at any level': Ian refutes Donald Trump's claim of planned US talks in Doha, June 30, 2026, <https://timesofindia.indiatimes.com/world/middle-east/no-negotiation-at-any-level-iran-refutes-donald-trumps-claim-of-planned-us-talks-in-doha/articleshow/132079125.cms>

The Lebanon issue is the first, and it nearly derailed the deal at the outset. Vance was initially scheduled to reach Switzerland on June 19 for the initial high-level phase of negotiations. Iran took the stand that the first point of the agreed upon MoU, mandating an immediate and permanent termination of operations on all fronts including in Lebanon, was being violated by continuing Israeli action against the Hezbollah; its negotiating team called off their travel to Switzerland. The US then talked Israel, the Hezbollah and Lebanon into a fragile ceasefire and established a de-confliction cell to wind down military hostilities, in the process appearing to reject Israel's security concerns while incentivising Iran to return to the negotiating table. Vance landed in Switzerland on June 21.

The US, Israel and Lebanon then signed on to a trilateral framework on June 26, effectively seeking to isolate and disarm the Hezbollah and restore full sovereign authority over the country to the Lebanese government, through the Lebanese Armed Forces⁴⁶. The framework was opposed by the Hezbollah, who said the group would confront any attempt to implement it and would not relinquish its weapons⁴⁷. Since the Hezbollah will not disarm, this issue will remain a problematic area between the US and Iran.

Restoration of status quo in the Strait of Hormuz is another key issue arising from the US war on Iran⁴⁸. It shapes the future of the established principle of freedom of navigation, as well as public perceptions of whether the US has won or lost the war it launched on February 28. The fourth point of the MoU calls for the US to immediately begin removal of its blockade and to fully end it within 30 days. Towards this end, the US Central Command notified lifting of the blockade on all maritime traffic entering or leaving Iranian ports and coastal areas on June 18⁴⁹, effectively giving Iran a financial lifeline without obtaining any concession in return.

The fifth point of the MoU commits Iran to make arrangements for the safe passage of commercial vessels with no charge for 60 days only, and to begin dialogue with Oman to define the future administration and maritime services. Notably, the joint statement of these two countries contained a reference not just to the future management of shipping in the Strait of Hormuz, but also to the related services to be provided in this

⁴⁶ Trilateral Framework Between the United States of America, the State of Israel, and the Republic of Lebanon, June 26, 2026, <https://www.state.gov/releases/office-of-the-spokesperson/2026/06/trilateral-framework-between-the-united-states-of-america-the-state-of-israel-and-the-republic-of-lebanon/>

⁴⁷ Hezbollah rejects Lebanon-Israel deal, warns of civil war, June 26, 2026, <https://www.newarab.com/news/hezbollah-rejects-lebanon-israel-deal-warns-civil-war>

⁴⁸ Seel Lalit Kapur, "The Iran War and Maritime Security", DPG Policy Brief Volume XI Issue 10, March 25, 2026, [https://www.delhipolicygroup.org/storage/uploads/publications_file/publication_DPG%20Policy_Brief_XI_Is_sue_10%20\(1\).pdf](https://www.delhipolicygroup.org/storage/uploads/publications_file/publication_DPG%20Policy_Brief_XI_Is_sue_10%20(1).pdf)

⁴⁹ <https://x.com/CENTCOM/status/2067660042736734352>

context and the costs relating to these services⁵⁰. The Persian Gulf Strait Authority, which Iran created in May, demanded that vessels register and sign up for a new mandatory Iranian insurance policy – free of charge for now, but not necessarily after 60 days⁵¹. Iran's chief negotiator Mohammad Bagher Ghalibaf said that the Strait of Hormuz would not return to its pre-war operating framework⁵². Meanwhile, Iran and Oman began their discussions on management of the Strait on June 29⁵³.

Traffic began flowing through the Strait of Hormuz on June 23, with the IMO announcing plans for the evacuation of more than 11,000 seafarers stranded inside the Gulf⁵⁴. The IRGC announced that the only route it would authorise was through its waters (and not through Omani waters)⁵⁵. The US, meanwhile, promulgated a route for shipping passing through Omani waters, bringing the negotiating positions of the two sides under strain. Iran acted to enforce its stand, with a drone struck M/V Ever Lovely, a container ship passing through the Omani side of Hormuz. The US responded, with strikes against Iran's missile and drone storage locations and coastal radar sites⁵⁶. Iran followed up with ballistic missile attacks on Kuwait and Bahrain. This kinetic action has jeopardised further negotiations between the two sides, as brought out earlier.

The gap between negotiating positions of the two sides became evident when Secretary Marco Rubio, in his remarks to the press on June 24, was adamant that tolls or fees for use of the Strait would just not be allowed to happen⁵⁷. Opening of the Strait of Hormuz without any tolls or fees also formed part of the Joint Statement of US and GCC Foreign Ministers the next day⁵⁸. President Trump also said that any

⁵⁰ Joint Statement by the Sultanate of Oman and the Islamic Republic of Iran, June 23, 2026, <https://en.mfa.ir/portal/newsview/790018/Joint-statement-by-the-Sultanate-of-Oman-and-the-Islamic-Republic-of-Iran>

⁵¹ Ephrat Livni, "Iran Makes Moves to Assert Control Over the Strait of Hormuz", June 23, 2026, <https://www.nytimes.com/2026/06/23/world/middleeast/iran-control-strait-of-hormuz.html>

⁵² Iran says Strait of Hormuz will no longer operate as before war; Tehran to administer waterway after US talks, June 23, 2026, <https://www.thestatesman.com/world/iran-says-strait-of-hormuz-will-no-longer-operate-as-before-war-tehran-to-administer-waterway-after-us-talks-1503608986.html>

⁵³ Iran, Oman begin joint talks on future governance of Strait of Hormuz, June 29, 2026, <https://newsonair.gov.in/iran-oman-begin-joint-talks-on-future-governance-of-strait-of-hormuz/>

⁵⁴ IMO announces evacuation plan in the Strait of Hormuz, June 23, 2026, <https://www.imo.org/en/mediacentre/pressbriefings/pages/imo-announces-evacuation-plan-in-strait-of-hormuz.aspx>

⁵⁵ Iran Strikes Ship in Strait of Hormuz, Undermining Efforts to Restore Traffic, June 25, 2026, <https://www.nytimes.com/2026/06/25/world/middleeast/iran-strait-of-hormuz-threat-rubio-bahrain.html>

⁵⁶ US Strikes Iran in Response to Attack on Commercial Vessel, June 26, 2026, <https://www.centcom.mil/MEDIA/PUBLIC-RELEASES/Article/4528341/us-strikes-iran-in-response-to-attack-on-commercial-vessel/>

⁵⁷ Secretary of State Marco Rubio Remarks to Press, June 24, 2026, <https://www.state.gov/releases/office-of-the-spokesperson/2026/06/secretary-of-state-marco-rubio-remarks-to-press-11/>

⁵⁸ Joint Statement Following the Ministerial Meeting of the United States and the Gulf Cooperation Council, June 25, 2025, <https://www.state.gov/releases/office-of-the-spokesperson/2026/06/joint-statement-following-the-ministerial-meeting-of-the-united-states-and-the-gulf-cooperation-council-gcc/>

fees on shipping through Hormuz are unacceptable⁵⁹. Iran, however, is committed to levying a charge on traffic passing through Hormuz. The gulf between it and the US remains, and unless US negotiators can get the better of Iran despite their lack of leverage, prospects of unconstrained navigation through the Strait of Hormuz appear dim. This will change the established regime under UNCLOS, and have implications for continued operations of the US Navy in Bahrain, as well as the Gulf at large. All in all, Iran has through weaponisation of the Strait of Hormuz obtained a weapon of mass disruption, a weapon it will not easily relinquish.

The eighth and ninth points of the MoU pertain to the nuclear dimension. Four broad issues remained: permanently stopping Iran's progress towards nuclear weapons; disposal of its stock of enriched Uranium; oversight mechanisms; and the maintenance of status quo. Iran affirmed that it shall not procure or develop nuclear weapons – but that is something Iran has always done, including when it ratified the NPT in 1970⁶⁰ and again when it accepted the July 2015 JCPOA⁶¹. Iran has always insisted that its nuclear programme is for peaceful purposes. However, the usage of Uranium for power generation requires enrichment only to the 3-5% level, while enrichment to around 20% is required for specialised research reactors that produce medical isotopes. There is no known civilian application for enrichment of Uranium to 60% - and Iran is estimated to have 440.9 Kg of Uranium enriched to 60%⁶². This can rapidly be enriched to 90%, which would make it weapons grade. The question has always been about disbelief in Iran's assurances, and negotiating credible safeguards to ensure compliance.

The disposal of this stock of enriched Uranium remains in question. Trump has repeatedly said that Iran must surrender it – he calls it “nuclear dust”. Iran's Supreme Leader, on the other hand, has said that the enriched Uranium must remain within Iran⁶³. On oversight mechanisms, Trump claimed that Iran “had fully and completely agreed to highest level Nuclear inspections long into the future (infinity)”⁶⁴. US Vice President JD Vance announced on June 22 that Iran had agreed to invite IAEA inspectors back into the country⁶⁵. Both were rebuffed by Iran's foreign ministry

⁵⁹ Trump Says Any Fees On Shipping Through Hormuz “Unacceptable”, June 25, 2026, <https://www.ndtv.com/world-news/donald-trump-says-any-fees-on-shipping-through-hormuz-unacceptable-11683620>

⁶⁰ Text of the Treaty, <https://www.un.org/en/conf/npt/2015/pdf/text%20of%20the%20treaty.pdf>

⁶¹ Joint Comprehensive Plan of Action, Vienna, July 14, 2015, <https://2009-2017.state.gov/documents/organization/245317.pdf>

⁶² Iran's Stockpile of Highly Enriched Uranium: Worth Bargaining For, March 16, 2026, <https://armscontrolcenter.org/irans-stockpile-of-highly-enriched-uranium-worth-bargaining-for/>

⁶³ ‘Enriched Uranium must remain inside Iran’: Mojtaba Khamenei rejects key US demand amid fragile ceasefire talks, May 27, 2026, <https://timesofindia.indiatimes.com/world/middle-east/enriched-uranium-must-remain-inside-iran-mojtaba-khamenei-rejects-key-us-demand-amid-fragile-ceasefire-talks/articleshow/131245755.cms>

⁶⁴ <https://x.com/TrumpTruthOnX/status/2069380819102380120>

⁶⁵ Barak Ravid, “Iran to allow UN nuclear inspectors back in, Vance says”, June 22, 2026, <https://www.axios.com/2026/06/22/iran-un-inspectors-vance>

spokesman Esmail Baqaei saying that Iran had no plans to allow inspectors to access nuclear sites bombed by the US and Israel last year⁶⁶. A similar divide also exists on Iran's maintenance of status quo in its nuclear programme – what constitutes status quo is left undefined. This leaves room open for Iran to extract the Uranium entombed after the 2025 and 2026 US-Israeli strikes, in the name of environmental protection or security. How negotiators bridge these divides remains to be seen.

The tenth point of the MoU requires the US Treasury Department to issue immediate waivers for the export of Iranian crude oil, petroleum products and derivatives, and all associated services, including banking transactions, insurances, transportation. This has been done on June 22, valid till August 21, 2026⁶⁷. The waiver enables operation of previously sanctioned vessels and payment in dollar-denominated funds. This is essentially an upfront US action; it enables Iran to sell its floating inventory estimated at about 67 million barrels of crude while restarting curbed production without any associate cost.

Linked is the eleventh point – the commitment to fully make available frozen Iranian funds and terminate all types of sanctions on Iran. This includes sanctions on Iran for terrorism by its proxies, as well as for human rights violations – the IRGC, which now has immense influence in Iran's government, is a designated Foreign Terrorist Organisation. President Trump has claimed the money released will go into escrow accounts controlled by the US, to be used for the purchase of food, agricultural and medical supplies exclusively from the United States⁶⁸. The Chief Iranian negotiator, MB Ghalibaf, described this the next day as a false claim, saying the US only exports genetically modified soybeans, broken promises and trash talks⁶⁹. Iran's ambassador to the UN has asserted that Iran is the only party that will decide how to use its unfrozen assets. This implicitly allows the use of unfrozen funds for supporting Iran's terrorist proxies, as well as for rebuilding its military capability, and not necessarily to provide relief to its population. What is actually true will come out as negotiations progress.

The sixth point of the MoU commits the US to develop with its regional partners a definitive, mutually agreed plan with at least USD 300 billion for reconstruction and economic development of Iran. The commitment has drawn sharp bipartisan criticism in the US. Saudi Arabia and the UAE have expressed deep unease with this

⁶⁶ Nathan Williams and Francisco Velasquez, "Iran says no new commitments on nuclear sites after Vance says inspectors to be invited back, June 23, 2026, <https://www.bbc.com/news/articles/c3vy3nr63gxo>

⁶⁷ Authorizing the Production, Delivery and Sale of Crude Oil, Petrochemical Products, and Petroleum Products of Iranian-Origin through August 21, 2026, <https://ofac.treasury.gov/media/936206/download?inline>

⁶⁸ Sarah Shamim, "Nuclear inspectors and frozen assets: what Iran and US can't agree upon", June 24, 2026, <https://www.aljazeera.com/news/2026/6/23/what-the-us-and-iran-agreed-and-disagreed-on-first-day-of-talks>

⁶⁹ https://x.com/mb_ghalibaf/status/2070119359607869733?s=20

commitment. The influx of capital and a wealthier Iran could translate into expanded military capability as well as increased funding for armed proxy groups. The commitment is also seen as a sign of US strategic disengagement and transactional diplomacy that could reshape the regional balance of power while leaving key security issues unresolved⁷⁰.

Finally, the issues of Iran's missiles and drones, as well as its support for armed proxies. Both issues are not addressed in MoU, but they are of critical importance to Gulf security. They could make the position of US bases in the region untenable – the damage to the US Naval Base in Bahrain, as also to its other bases in the region, has already resulted in the US considering shifting some bases west⁷¹.

When the US and Israel launched their military campaign on February 28, 2026, Trump had explicitly framed the strikes as a catalyst for regime change and exhorted Iranian citizens to take over their government. De-capitation strikes leading to the killing of nearly 50 Iranian leaders, coupled with the covert arming of Iranian Kurdish opposition groups, formed part of this campaign. The fact that he is now negotiating, instead of trying to militarily impose peace on his terms, is widely seen as a strategic loss for the US.

The Iranian regime has proved far more resilient than Trump (and Netanyahu) anticipated. Mojtaba Khamenei smoothly took over as Iran's Supreme Leader following his father's death, and the IRGC gained in power. The new Supreme Leader has distanced himself from the MoU and placed political and strategic responsibility for it on Iranian President Masoud Pezeshkian⁷², creating space for revoking it at a time of his choosing. Trump, in a reversal of his previous stance, describes the current set of Iranian leaders as very smart, far less radicalised, looking to help their country and more pragmatic. He agrees to respect Iran's sovereignty and territorial integrity and not to interfere in Iran's internal affairs, abandoning ambitions for regime change and setting a precedent for other authoritarian regimes, as for example in China. Iran has made tangible progress towards the elimination of US presence from the region and has emerged strategically stronger from the conflict, notwithstanding the military setbacks. As rightly observed by Ghalibaf, Iran has achieved much more from negotiation than it wanted to achieve through military action⁷³.

⁷⁰ Gulf States Reassess Security Strategy as US-Iran Agreement Raises Regional Concerns, June 26, 2026, <https://politicstoday.org/gulf-states-reassess-security-strategy-as-us-iran-agreement-raises-regional-concerns/>

⁷¹ How Iran Devastated an American Naval Base – and Caused a US Recalculation, June 25, 2026, <https://www.wsj.com/world/middle-east/iran-us-naval-base-bahrain-e87bbca3>

⁷² Yeganeh Torbati, "Iran's Supreme Leaders Says He Dislikes Deal With US, but Allowed it", June 19, 2026, <https://www.nytimes.com/2026/06/19/world/middleeast/mojtaba-khamenei-iran-deal-reaction.html>

⁷³ Ghalibaf: Negotiations Yielded Far Greater Results Than Military Action, June 18, 2026, <https://wanaen.com/ghalibaf-negotiations-yielded-far-greater-results-than-military-action/>

The complete failure of the US to protect even its own bases and facilities in the region, leave alone the infrastructure and hydrocarbon export lifeline for regional economies, will definitely have registered on Arab leaders. Trump's face-saving search for an exit from the conflict will result in far-reaching changes in the region's security arrangements, with impact on the entire region. It could make the position of US bases in the region untenable.

Is the MoU a meaningful step in the return of peace to the region? This appears unlikely. The gap between the negotiating positions of the two sides appears unbridgeable. Trump has already threatened to return to the military option and warned that if the US does so, the Islamic Republic of Iran will no longer exist⁷⁴. Iran, however, believes it has the stronger hand and that a return to conflict is unlikely. What is evident is that negotiations are unlikely to conclude within the projected 60 days, and that the continued standoff between the US and Iran will continue to impact the economies of Asia and Europe.

The Modi Trump Meeting

Prime Minister Narendra Modi met US President Donald Trump on the sidelines of the G7 Summit at Evian, on June 17⁷⁵. It was their first meeting after the "very substantive and productive"⁷⁶ Modi visit to Washington DC in February 2025, following which the two countries had issued an expansive joint statement spelling out the future direction of bilateral ties⁷⁷. India-US relations went into a tailspin shortly thereafter, with the US first holding up finalisation of the bilateral trade deal, then Trump embarrassing Modi politically by claiming he had forced a ceasefire between India and Pakistan, followed by the imposition of punitive sanctions on India⁷⁸. The much anticipated Quad Summit in New Delhi did not materialise.

The leaders missed meeting each other even at multilateral events, such as the June 2025 G7 Summit in Canada (the official explanation was that Trump had to leave

⁷⁴ <https://truthsocial.com/@realDonaldTrump/posts/116824603632739697>

⁷⁵ Prime Minister meets President of the United States of America on the sidelines of the G7 Summit in Evian, June 17, 2026, https://www.mea.gov.in/press-releases?dtl/41330/Prime_Minister_meets_President_of_the_United_States_of_America_on_the_sidelines_of_the_G7_Summit_in_Evian_June_17_2026

⁷⁶ As described by India's Foreign Secretary, "Transcript of Special briefing by MEA on Prime Minister's visit to USA", February 13, 2025, https://www.mea.gov.in/media-briefings.htm?dtl/39068/Transcript_of_Special_briefing_by_MEA_on_Prime_Ministers_visit_to_USA_February_13_2025

⁷⁷ India - US Joint Statement during the visit of Prime Minister of India to the US, February 13, 2025, <https://pib.gov.in/PressReleasePage.aspx?PRID=2103037>

⁷⁸ For an overview of the deterioration in relations, see Lalit Kapur, "A Reprieve for the Quad", DPG Policy Brief Volume XI, Issue 16, June 13, 2026, https://www.delhipolicygroup.org/storage/uploads/publications_file/publication-1781333712-dpg-policy-brief-xi-issue-16pdf.pdf

early⁷⁹). Modi declined an invitation to stop over in Washington DC on his way back from Canada⁸⁰. He did not go to Kuala Lumpur for the October 2025 East Asia Summit (his first absence from this summit, with analysts speculating that he participated virtually to avoid an awkward encounter with Trump). Another opportunity could have been the Johannesburg G20 Summit in November 2025, but Trump boycotted that event on account of dubious claims of genocide against white Afrikaners in South Africa.

India maintained a dignified silence despite American provocation, focusing on making the Comprehensive Global Strategic Partnership (CGSP) work. The renewal of the US India Defence Framework Agreement in October 2025⁸¹ provides visible evidence of this. The US too began investing in resetting the relationship. Deputy Secretary of State Christopher Landau visited India in March 2026⁸², and Assistant Secretary of War Elbridge Colby followed the same month⁸³. Their visits set out the changed parameters of the US approach towards relationships, including with India. India's Foreign Secretary Vikram Misri visited Washington DC in April 2026⁸⁴. Secretary of State Marco Rubio came to India in May 2026⁸⁵. These events indicated an effort from both sides to reset the bilateral relationship.

The meeting at Evian marks another step towards the resetting of relations. In the event, it appears to have been cordial, without either side doing anything that would vitiate the relationship. PM Modi commended President Trump for his efforts to end the ongoing conflict in West Asia. He underlined the importance of maintaining freedom of navigation and unimpeded commerce in Hormuz, as well as the need to ensure safety of mariners. Leaders reviewed the progress under the India-US COMPACT, the umbrella initiative covering defence, technology, trade, energy and critical mineral supply chains. They noted progress in negotiations on the Bilateral

⁷⁹ English Translation of Foreign Secretary's statement on the telephone conversation between PM and US President, June 17, 2025, <https://www.mea.gov.in/outgoing-visit-detail?39692/english-translation-of-foreign-secretarys-statement-on-the-telephone-conversation-between-pm-and-us-president-june-17-2025>

⁸⁰ PM Modi on why he declined Trump's invite to visit US, June 20, 2025, <https://www.ndtv.com/india-news/pm-narendra-modi-on-why-he-rejected-donald-trump-invite-to-visit-washington-dc-8718287>

⁸¹ Fact Sheet: Framework for the US-India Major Defense Partnership, October 31, 2025, <https://media.defense.gov/2025/Nov/13/2003820236/-1/-1/1/FACT-SHEET-FRAMEWORK-FOR-THE-US-INDIA-MAJOR-DEFENSE-PARTNERSHIP.PDF>

⁸² Deputy Secretary of State Christopher Landau at the Raisina Dialogue, March 5, 2026, <https://www.state.gov/releases/office-of-the-spokesperson/2026/03/deputy-secretary-of-state-christopher-landau-at-the-raisina-dialogue/>

⁸³ Remarks by Under Secretary of War for Policy Elbridge Colby at the Ananta Centre in India, March 24, 2026, <https://www.war.gov/News/Speeches/Speech/Article/4442027/remarks-by-under-secretary-of-war-for-policy-elbridge-colby-at-the-ananta-centr/>

⁸⁴ Visit of Foreign Secretary to Washington DC, April 7, 2026, <https://www.mea.gov.in/press-releases?dtl/41022/Visit-of-Foreign-Secretary-to-Washington-DC-April-08-10-2026>

⁸⁵ For an overview, see Lalit Kapur, "Marco Rubio's First Visit to India" in the Indo-Pacific Monitor, Volume VII Issue 5, May 2026, https://www.delhipolicygroup.org/storage/uploads/publications_file/publication_Indo-Pacific%20Monitor-%20Vol%20VII,%20Issue%205.pdf

Trade Agreement. Leaders reaffirmed their commitment to strengthen the India-US Comprehensive Global Security Partnership and advance cooperation across all domains.

At the same time, the optics of the joint press interaction by the leaders are not convincing⁸⁶. The interaction was unilateral, with Modi restricting himself to a short statement. While Trump was laudatory about Modi and the US relationship with India, his words lacked conviction. The trade deal remains to be concluded more than one year after reports indicated that it was done, indicating that some change in the goalposts that has still not been resolved. Trump was ambiguous on a question about the Quad Summit, talking about his last visit but saying nothing about the future. He was non-committal about the sanctions on Russian oil (the current waiver issued by the US expired on June 17, impacting India). Trump's response to a question about the loss of Indian lives as a result of American strikes to enforce its blockade was anything but apologetic. He avoided a question about opportunities for highly skilled Indian immigrants in the US. The overall impression was that the US will continue with its unilateral approach – and India will go along with this changed reality.

The India-US Comprehensive Global Strategic Partnership remains, though the personal chemistry between leaders that drove it in the past has taken a beating. The US relationship remains amongst the most consequential for India, even though shared values no longer drive it and there is greater uncertainty. On June 27, Secretary of State Marco Rubio was reported to have said that President Trump is likely to visit India in early 2027⁸⁷. This indicates India's continued investment in the relationship, in the hope of better times ahead.

The Second India Australia Defence Ministers' Meeting

Defence relations between India and Australia continued their onward march with Australia's Defence Minister and Deputy Prime Minister Richard Marles meeting his counterpart Shri Rajnath Singh in New Delhi on June 01 for the Second India-Australia Defence Ministers' Meeting⁸⁸. The meeting was in preparation for the forthcoming Annual Leaders' Summit: PM Narendra Modi is scheduled to visit Australia (as well

⁸⁶ PM Narendra Modi and Donald Trump Meet at G7 Summit in Evian, https://www.youtube.com/watch?v=NfjH_OAB4XQ

⁸⁷ Trump likely to visit India early next year, Rubio tells IANS, June 27, 2026, <https://www.reuters.com/world/india/trump-likely-visit-india-early-next-year-rubio-tells-indias-ians-2026-06-27/>

⁸⁸ Joint Statement on the Second India-Australia Defence Ministers' Dialogue, June 01, 2026, <https://www.minister.defence.gov.au/statements/2026-06-01/joint-statement-second-india-australia-defence-ministers-dialogue>

as Indonesia and New Zealand) for this in early July⁸⁹. The interaction between the ministers reflected continuing progress in bilateral defence cooperation, but also brought up areas where more can be done to transform strategic alignment into concrete operational and defence industrial outcomes.

The first India-Australia Defence Ministers' Meeting in October 2025 had focused on institutional alignment and regional security, maritime security, defence industrial and technology cooperation, expanded military exercises and interoperability, and training and personnel exchanges⁹⁰. These areas formed the substance of the discussion during the second meeting on June 01.

The ministers welcomed progress towards renewing and strengthening the Joint Declaration on Defence and Security Cooperation. The last such joint declaration was in 2009⁹¹; it has been overtaken by geopolitical developments, the growing convergence between the two countries and upgradation of bilateral relations to a Comprehensive Strategic Partnership in June 2020⁹². A new joint declaration will probably be signed when Prime Minister Narendra Modi visits Australia in July 2026.

Another initiative nearing fruition is the Joint Maritime Security Collaboration Roadmap, discussed by the ministers in October 2025 and June 2026. The ministers agreed to progress collaborative maritime domain awareness activities by maritime patrol aircraft and explore opportunities to enhance undersea domain awareness. They also encouraged cooperation between India's Coast Guard and Australia's Maritime Border Command. They further agreed to continued aircraft deployment from each other's territories to build operational familiarity (Australian P-8As have deployed from INS Rajali in Arakkonam as well as INS Hansa in Goa, but not from Port Blair, while Indian P-8Is have deployed from the RAAF bases at Darwin and Pearce, near Perth, and hope to operate from the Cocos Island base once it is upgraded).

The ministers affirmed the importance of enhancing cooperation with regional partners to help maintain a free, open, peaceful, stable and prosperous Indo-Pacific,

⁸⁹ Siddhant Sibbal, "PM Modi's key Indo-Pacific visit next month: Indonesia, Australia, New Zealand", June 07, 2026, <https://www.wionews.com/world/pm-modi-s-key-indo-pacific-visit-next-month-indonesia-australia-new-zealand-1780824793204>

⁹⁰ For an overview, see Lalit Kapur, "India Australia Defence Ministers' Dialogue", Indo-Pacific Monitor, Volume VI Issue 10, October 2025, [https://www.delhipolicygroup.org/storage/uploads/publications_file/publication_Indo-Pacific%20Monitor-%20Vol%20VI,%20Issue%2010%20\(1\).pdf](https://www.delhipolicygroup.org/storage/uploads/publications_file/publication_Indo-Pacific%20Monitor-%20Vol%20VI,%20Issue%2010%20(1).pdf)

⁹¹ India-Australia Joint Declaration on Security Cooperation, November 12, 2009, <https://india.embassy.gov.au/ndli/pa5009jsb.html>

⁹² Joint Statement on a Comprehensive Strategic Partnership between Republic of India and Australia, June 04, 2020, <https://www.mea.gov.in/bilateral-documents?dtl/32729/Joint+Statement+on+a+Comprehensive+Strategic+Partnership+between+Republic+of+India+and+Australia>

underscoring the importance of freedom of navigation and overflight, unimpeded trade and other lawful uses of the sea consistent with international law. Notwithstanding this rhetoric, progress in the security domain in regional trilaterals, such as Japan-Australia-India, Japan-Indonesia-India and Australia-France-India has been somewhat limited. There is need to find ways of reinvigorating these trilaterals.

The ministers announced that the two nations would begin developing a Memorandum of Understanding regarding the provision of Defence Articles and Defence Services. This is an evolutionary step from the 2020 Mutual Logistics Support Agreement, directed towards creation of a framework for defence industrial cooperation, encompassing manufacturing, sustainment and supply chains. The Joint Working Group on Defence Industry, Research and Materiel will take the process further. The ministers also looked forward to cooperation in new areas such as sensor technologies.

India participated in multinational Exercise Talisman Sabre for the first time in July 2025 and is expected to participate in the 2027 edition of the exercise. India also participated in Australia's biennial Exercise Kakadu from 2018 onwards (the 2020 edition was cancelled due to Covid-19), with INS Nilgiri taking part in the 2026 edition of the exercise as well as the associated Fleet Review. India has also participated in Exercise Pitch Black from 2018 onwards (the 2020 edition was cancelled due to Covid-19) and is expected to do so again in July 2026, which is also expected to see implementation of the bilateral implementing arrangement on air-to-air refuelling. On the other hand, Australia has been a regular participant in India's Exercise MILAN, including the 2026 edition. It also participated in India's inaugural Exercise Tarang Shakti in 2024, and is likely to do so again in the 2026 edition of the exercise. At the bilateral level, Australia will participate in the 2026 edition of Exercise Austrahind, expected in October/November 2026; the exercise will focus on amphibious combat and littoral manoeuvre. India has deployed an observer for the ongoing 2026 edition of Australian-led Operation Render Safe 2026 in PNG, and welcomed Australia's invitation to participate in the annual submarine rescue exercise Black Carillon.

Defence cooperation between India and Australia has certainly picked up substantially from just a two decades ago, when Australia had suspended bilateral defence relations completely following Pokhran-II. Upgradation of the bilateral relationship to a comprehensive strategic partnership⁹³ and a share vision for

⁹³ Joint Statement on a Comprehensive Strategic Partnership between Republic of India and Australia, June 04, 2020, https://mea.gov.in/bilateral-documents.htm?dtl/32729/Joint_Statement_on_a_Comprehensive_Strategic_Partnership_between_Republic_of_India_and_Australia

maritime cooperation in the Indo-Pacific⁹⁴ provided the vision for this cooperation. The two nations lack the capacity, however, to secure the Indo-Pacific without US backing. With the US outlook towards the Indo-Pacific undergoing change, it remains to be seen how bilateral defence cooperation between India and the US will evolve.

Other Indo-Pacific Developments

India – Seychelles Engagement. India continued its high-level engagement with the Seychelles when Prime Minister Narendra Modi paid a State Visit to the country from June 27-29 and was the Guest of Honour at the Golden Jubilee celebrations of the National Day of Seychelles. Seychelles President Patrick Herminie had earlier made New Delhi the destination of his first international visit, signifying the strength of bilateral relations⁹⁵. The two leaders had then announced the India – Seychelles Joint Vision for Sustainability, Economic Growth and Security Through Enhanced Linkages⁹⁶. PM Modi addressed the National Assembly of the Seychelles⁹⁷, becoming the first Indian Prime Minister (and possibly the first international leader) to do so. The Seychelles conferred upon PM Modi the distinction of “The Guardian of the Blue Horizon,” the first time the award has been bestowed⁹⁸. The Prime Minister gifted a fast patrol vessel named L'Espoir, which means Hope in Creole, to the Special Seychelles Defence Forces. He also handed over 10 utility vehicles and five laser radial boats to the Seychelles Defence Forces; their gifting had been announced in February 2026. There were in all 19 outcomes of the visit⁹⁹. In sum, the visit consolidated India’s relationship with an important Indian Ocean island nation, added to India’s maritime security, reinforced the February 2026 joint vision, and enhanced the maritime capability of the Seychelles.

Visit of Venezuelan President to India. Acting Venezuelan President Delcy Rodriguez, accompanied by a large ministerial delegation, paid a working visit to

⁹⁴ Joint Declaration on a Shared Vision for Maritime Cooperation in the Indo-Pacific Between Republic of India and the Government of Australia, June 04, 2020, <https://www.dfat.gov.au/geo/india/joint-declaration-shared-vision-maritime-cooperation-indo-pacific-between-republic-india-and-government-australia>

⁹⁵ For an overview, see Lalit Kapur, “Visit of President of Seychelles to India”, in the Indo-Pacific Monitor Volume VII Issue 2, February 2026, https://www.delhipolicygroup.org/storage/uploads/publications_file/publication_Indo-Pacific%20Monitor-%20Vol%20VII,%20Issue%202.pdf

⁹⁶ India – Seychelles Joint Vision for Sustainability, Economic Growth and Security Through Enhanced Linkages, February 09, 2026, <https://www.pib.gov.in/PressReleasePage.aspx?PRID=2225395®=3&lang=1>

⁹⁷ For text of the address, see PM’s Address to the National Assembly of the Seychelles, June 28, 2026, https://www.mea.gov.in/speeches-statements?dtl/41369/PMs_Address_to_the_National_Assembly_of_Seychelles_June_28_2026

⁹⁸ Transcript of Special Briefing by MEA on the State visit of Prime Minister to Seychelles, June 28, 2026, https://www.mea.gov.in/media-briefings?dtl/41374/Transcript_of_Special_Briefing_by_MEA_on_the_State_Visit_of_Prime_Minister_to_Seychelles_June_28_2026

⁹⁹ For a list, see List of Outcomes: State Visit of Prime Minister to Seychelles, June 28, 2026, <https://www.pib.gov.in/PressReleasePage.aspx?PRID=2278656®=48&lang=1>

India from June 03-06 to rebuild energy ties and expand economic cooperation¹⁰⁰. She discussed enhancing bilateral cooperation in the energy sector, as well as in mining, in areas like animal husbandry, transportation, agriculture equipment, automotive sector and pharmaceuticals. There were, however, no official statements or agreements announced after her visit.

White House Seeks to Buy Chagos Islands. Reports indicate that the US is developing a plan to buy the Chagos Islands, including Diego Garcia, from Mauritius¹⁰¹. The plan is one of the alternatives to the UK ceding sovereignty over the archipelago to Mauritius; it would eliminate concerns about future political restrictions, including on the positioning of nuclear weapons, complicating unrestricted US military operations from Diego Garcia. The UK has presently shelved parliamentary approval for the treaty transferring the Chagos Islands to Mauritius. For the US purchase to go ahead, Mauritius would first have to gain sovereignty over the archipelago. Whether it would agree to sell is questionable.

Commissioning of IN Ships by PM. Prime Minister Narendra Modi commissioned three Indian Naval ships at Kolkata on June 21¹⁰². INS Dunagiri is the fifth ship of the Nilgiri class of advanced stealth frigates (the last two ships of the class are expected to be commissioned in July 2026 – all seven ships of the class will have been commissioned in a span of 18 months), INS Sanshodak is the fourth and last ship of the Sandhayak class of large survey vessels, and INS Agray is the fourth ship of the Arnala class of ASW Shallow Water Craft.

Exercise RIMPAC. The 30th edition of Exercise RIMPAC, the world's largest maritime exercise, began with an opening ceremony and press conference at Hawaii on June 24¹⁰³. Although India is listed as a participating country¹⁰⁴, there are no reports of any Indian warship proceeding to Hawaii for the exercise. This will be the first absence of an IN warship from RIMPAC since 2014, signalling a downgrading of India's engagement with the US Pacific Command.

Xi Jinping Visits North Korea. In his first international visit of the Year, China's President Xi Jinping visited Pyongyang from June 08-09. The visit was intended to reassert China's influence in the backdrop of Kim Jong-Un's growing military

¹⁰⁰ Acting President of Venezuela meets Prime Minister, June 04, 2026, <https://www.pib.gov.in/PressReleasePage.aspx?PRID=2269100®=3&lang=1>

¹⁰¹ US considers buying Chagos Islands: report, June 07, 2026, <https://www.reuters.com/world/europe/us-considers-buying-chagos-islands-telegraph-reports-2026-06-07/>

¹⁰² Prime Minister Shri Narendra Modi commissions three indigenously designed and built naval ships – INS Dunagiri, INS Sanshodak and INS Agray at Syama Prasad Mookerjee Port, Kolkata, West Bengal, June 21, 2026, <https://www.pib.gov.in/PressReleasePage.aspx?PRID=2276015®=48&lang=1>

¹⁰³ RIMPAC 2026 Kicks Off in Hawaii, June 25, 2026, <https://www.pacom.mil/Media/News/News-Articles/Article/4527435/rimpac-2026-kicks-off-in-hawaii/>

¹⁰⁴ Participants, <https://www.cpf.navy.mil/About-Us/Exercises-Missions/RIMPAC/Participants/>

alignment with Russia. The leaders agreed to the resumption of transport links and reports indicate that they agreed to a far-reaching blueprint for the development of relations¹⁰⁵. There was no reference to North Korea's denuclearisation or other major geopolitical issues in their talks.

PM Modi Visit to Slovakia. Prime Minister Narendra Modi paid the first visit by any Indian Prime Minister to Slovakia since its independence in 1993 on June 15. The two countries elevated relations to a comprehensive partnership¹⁰⁶. The two countries reaffirmed their commitment to a free, open, peaceful and prosperous Indo-Pacific, based on respect for international law, sovereignty and territorial integrity, including UNCLOS. They underscored the importance of strengthening defence and security cooperation as one of the key pillars of the bilateral partnership, and welcomed the signing of a letter of intent on defence cooperation between the two sides. The visit provides India a highly industrialised Central European gateway, access to the EU common market, the possibility of technology transfers from a well-developed military industry, and avenues for skilled Indian labour.

Establishment of Submarine Rotational Force-West. The US Navy announced the commencement of support activities at HMAS Stirling, including the reestablishment of US Submarine Squadron 3 to oversee the operation of US SSNs rotating from HMAS Stirling, the establishment of a Lead Maintenance Activity in Western Australia from mid-2026 and the establishment of Naval Support Activity Stirling. The announcements bring the operationalisation of a US SSN base in Garden Island, near Perth, closer.

AUKUS Submarines. Australia, UK and the US announced that Australia would acquire three in-service Virginia Class Submarines, in lieu of two in-service Block IV and one new Block VI boats announced earlier¹⁰⁷. The intent underlying the decision was described as simplifying supply chain management, operational and maintenance requirements and maximising cost effectiveness. The Block VI boats are 85 ft longer, carry triple the missile payload, and have better sensors. Australia will also lose the additional service life it would have obtained from buying a new boat.

France and Australia to Upgrade Their Roadmap for Cooperation. The Foreign Ministers of France and Australia reaffirmed their commitment towards a peaceful, stable, prosperous Indo-Pacific region, which remains open and inclusive, and where

¹⁰⁵ North Korea says Xi's visit produced 'far-reaching blueprint' for ties, June 10, 2026, <https://www.channelnewsasia.com/east-asia/north-korea-china-xi-jinping-visit-6172521>

¹⁰⁶ India-Slovakia Joint Statement, June 15, 2026, <https://www.pib.gov.in/PressReleasePage.aspx?PRID=2273091®=48&lang=1>

¹⁰⁷ Joint Statement, AUKUS Defence Ministers' Meeting, May 30, 2026, <https://www.minister.defence.gov.au/statements/2026-05-30/joint-statement-aukus-defence-ministers-meeting>

the sovereignty of all states is fully respected, in a joint statement on June 09¹⁰⁸. The Ministers confirmed their common intention to elevate the bilateral relationship through the adoption of an upgraded Australia-France Roadmap, which will provide a framework for further strategic engagement. This will build upon the results achieved under their 2023 roadmap across the three pillars of Defence and Security, Resilience and Climate Action, and Education and Culture.

Philippines Considering Acquisition of Japan's Type 88 Cruise Missile. The Philippines is considering acquisition of Japan's used Type 88 land-based anti-ship cruise missiles, according to a media report¹⁰⁹. The Type 88 surface-to-ship missile is sub-sonic, sea-skimmer using inertial guidance and terminal active radar homing to strike targets at a range of up to 180 Km. It was inducted in the late 1980s and is now being replaced in Japan by the Type 12. The missile was fired by Japanese forces participating in Exercise Balikatan 2026 for the first time. This is the first high-end lethal weapon system Tokyo is considering for export under its revised defence export framework.

Japan Indonesia to Discuss Transfer of Asagiri-Class Destroyers. Defence Ministers of Japan and Indonesia agreed to commence discussions on the transfer of Japan's Asagiri-class destroyers to Indonesia¹¹⁰. Indonesian President Prabowo Subianto supported the transfer of defence equipment by Japan and looked forward to tangible progress¹¹¹. Other areas of cooperation discussed include the sharing of classified information, more efficient and effective use of ports, and cooperation in logistics and maintenance services. The discussion comes shortly after Japan revised its rules on export of lethal defence equipment: Japan is in parallel discussing the transfer of Abukuma-class destroyers to the Philippines.

Indian Army US Army Pacific ESG Meeting. The Indian Army and US Army Pacific held a meeting of the Executive Steering Group at Hawaii from June 04-05¹¹². The ESG prioritized improving interoperability by enhancing current engagements and

¹⁰⁸ Joint Statement between France and Australia: upgrading the Australia-France Roadmap: A Framework for Strategic Cooperation, June 09, 2026, <https://www.foreignminister.gov.au/minister/penny-wong/media-release/joint-statement-between-france-and-australia-upgrading-australia-france-roadmap-framework-strategic-cooperation>

¹⁰⁹ Gabriel Dominguez, "Japan eyes first export of indigenous missile system amid closer ties with Philippines", June 01, 2026, <https://www.japantimes.co.jp/news/2026/06/01/japan/japan-philippines-missiles-sales/>

¹¹⁰ Japan - Indonesia Defence Ministerial Meeting, June 05, 2026, https://www.mod.go.jp/en/images/20260605_idn-j_en.pdf

¹¹¹ Courtesy Call on President Prabowo by Defence Minister Koizumi and the Japan-Indonesia Defence Ministerial Meeting, June 13, 2026, <https://www.mod.go.jp/en/article/2026/06/293654b38c7dfc989125230c0b7f804456ae397a.html>

¹¹² USARPAC, Indian Army advance bilateral partnership during Executive Steering Group, June 08, 2026, <https://www.pacom.mil/Media/News/News-Articles/Article/4511808/usarpac-indian-army-advance-bilateral-partnership-during-executive-steering-gro/>

identifying new opportunities for growth to build on collective strengths within an increasingly dynamic security environment.

DRDO Missile Tests. The DRDO carried out three flight tests on June 10&11 to demonstrate multi-layered defence against long range ballistic missiles and anti-ship capability at medium range¹¹³. It followed up with the flight test of a Long Range Land Attack Cruise Missile on June 15¹¹⁴.

North Korea Commissions First Choe Hyon Class Destroyer. North Korea commissioned the first of its Choe Hyon class destroyers at Nampo on June 23¹¹⁵. The largest warship in the North Korean Navy, the ship is the first to be equipped with a phased array radar and a vertical launching system for missiles. It has taken just over two years to build.

Bangladesh China Relations. Bangladesh Prime Minister Tarique Rahman paid an official visit to China from June 22-26¹¹⁶. He met Prime Minister Li Qiang, President Xi Jinping and Chairman of the Standing Committee of the National People's Congress Zhao Leji. Bangladesh and China formalised deals for China's modernisation of Mongla Port as well as a Chinese Economic and Industrial Zone at Chattogram. China agreed to zero-tariff treatment for 100% of tariff lines. The two sides agreed to deepen defence cooperation, including establishing a 2+2 diplomacy and defence dialogue and Bangladesh's procurement of 24 J-10CE fighters. Rahman's BNP signed a party-level MoU with the Communist Party of China.

¹¹³ DRDO demonstrates the nation's next-gen defence capabilities, June 13, 2026, <https://www.pib.gov.in/PressReleasePage.aspx?PRID=2272374®=48&lang=1>

¹¹⁴ DRDO conducts successful flight test of Long Range Land Attack Cruise Missile, June 15, 2026, <https://www.pib.gov.in/PressReleasePage.aspx?PRID=2273160®=48&lang=1>

¹¹⁵ Dzirhan Mahadzir, "North Korea Commissions First-in-class Destroyer Choe Hyon", June 24, 2026, <https://news.usni.org/2026/06/24/north-korea-commissions-first-in-class-destroyer-choe-hyon>

¹¹⁶ Joint Communiqué Between the People's Republic of China And the People's Republic of Bangladesh, June 26, 2026, https://in.china-embassy.gov.cn/eng/zgxw/202606/t20260626_11953167.htm



Delhi Policy Group
Core 5A, 1st Floor,
India Habitat Centre, Lodhi Road
New Delhi - 110003
India

www.delhipolicygroup.org