

An Assertive Giant

The Geopolitics of India in an Evolving Global Order

Jahangir E. Arasli

“India does not need to emulate any other country. India must become only India.”

– Narendra Modi

The ongoing, sweeping metamorphosis of the world order, among other factors, is shifting the globe’s strategic pivot towards the Indo-Pacific region. Once just a geographic concept, it has become a distinct geopolitical reality in the past decade. The Indo-Pacific region plays host to over 60 percent of the world’s population, around 60 percent of global GDP, 65 percent of the planet’s ocean surface and 25 percent of its landmass, three of the world’s four largest economies, and six countries belonging to the G20. Not coincidentally, 11 leading actors (e.g., the U.S., the EU, France, Japan, Canada,) have already adopted the official strategy documents on that macro-region.

India occupies a special place among other Indo-Pacific countries. It is rapidly transforming itself into a premier power whose strategic, economic, and cultural outreach stretches far beyond its macro-region, to now influence existing international balances, which is propelling it into a leading role in the Global South.

India is much less well-known in the Silk Road region that it should be. Thus, this IDD Working Paper represents a first attempt to grasp the ascending global role of India, as well as its geopolitical mindset, ambitions, and interests, with particular emphasis on security concerns. More specifically, this document focuses on explaining how the need

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to maintain connectivity to the world drives India's alliance-building strategy, including the logic and rationales behind the developing Indian-Armenian rapprochement.

India's "Elephant Walk"

India is the largest democracy in the world and one of only nine declared nuclear powers. In 2023, its demography bypassed that of China: some 1.4 billion people live in India, and over 100 million of them are at the work-productive age of between 20 and 25 years.

India's economic potential is developing exponentially. Its GDP has grown sixfold since 2000. In 2022, the country ranked fifth in the world in terms of GDP, thus surpassing its former colonizer, the UK. Its oil refining capabilities (5 billion barrels per day) exceed the combined capabilities of the UK, France, Italy, and Türkiye. India is first in the world by area of arable lands (1.5 million square kilometers) and by the size of irrigated land (over 500,000 square kilometers). It invests heavily in developing its transportation infrastructure and connectivity, as illustrated by India's recent mega-contracts to purchase 250 Airbus and 300 Boeing passenger jetliners and 1,200 railway locomotives from Siemens. In addition, its scientific and technical progress—especially in the IT sphere, artificial intelligence, and bioengineering—is transforming the country into a global knowledge hub.

China's ongoing economic recession and increasing centralization of power are but two factors motivating industries and capital increasingly to shift their operations to India. By 2030, each second iPhone in the world will be made in India. As forecasted, changing geopolitical trends, infrastructural development, digitalization, and favorable investment climate will propel India by 2030 to third place among top world economies. This implies that the country may become the primary driver of global economic development—akin to China in 1990s-2000s.

Equally important, beyond its geo-economic weight, India is coming to play the role of an essential counterbalance to the multiple challenges some see as emanating from China—in hard security terms included. This is how India is viewed and treated by most Euro-Atlantic and a preponderance of other Indo-Pacific actors.

Furthermore, India owns an unparalleled instrument of soft power to advance its strategic interests worldwide: its diaspora (a.k.a., "Global India"). Over 30 million people with Indian roots live in the Gulf, North America, Europe, Southeast Asia, East and South Africa, the Caribbean, Australia, and Oceania. The global Indian diaspora controls assets worth \$1 trillion (in hi-tech and industrial companies, banks, brands, real estate, etc.). Just the diaspora's remittances to India in 2021 amounted to \$87 billion, which comes to 3.2 percent of the country's GDP. Ethnic Indians are successful in advanced sciences and leading the managerial elite of top global companies, including Google, Microsoft,

Twitter, MasterCard, IBM, Starbucks, and Chanel. As of 2022, Indians manage 58 business entities on the Forbes 500 list, and one-third of IT-engineers in Silicon Valley are of the Indian origin.

Ethnic Indians maintain a high degree of influence on state and public institutions as well as the domestic and foreign policies of their countries of residence. Over 200 politicians of Indian ancestry hold top executive and legislative offices in the U.S., the UK, Canada, Ireland, Portugal, Australia, Singapore, Malaysia, Mauritius, Guyana, and Suriname. Among them are the UK Prime Minister, the UK Home Secretary, the Mayor of London, the First Minister of Scotland, the U.S. Vice President, the Minister of National Defense of Canada, and many others.

Beyond the diaspora, India enjoys other assets of soft power, such as Bollywood (the Hindu cinema industry enjoys much popularity worldwide, especially in the Global South), as well as what appears to many foreigners to be an exotic Indian culture and cuisine that multiplies India's "charm offensive" globally.

Geopolitical Destiny: Wrapped in Itself

From the standpoint of geopolitics, India is an "island," as George Friedman once put it. The rough Himalayan mountain terrain raises a natural barrier in the north while the ocean engulfs the country from the west, east, and south. China is India's historical challenger. Other countries nearby are either hostile to it (i.e., Pakistan) or gravitate one way or another towards Chinese influence (e.g., Bangladesh, Bhutan, Maldives, Myanmar, Nepal, Sri Lanka). The core congregation of the mainstream religion of India (Hinduism) is solely contained within the Indian subcontinent (save the Indian migrant communities around the world) where it coexists in friction with other faiths.

Factors of geography, strategic confrontations, and religion predetermine India's "strategic loneliness" in its immediate surroundings and requires it to seek alliances, partnerships, counterbalancing solutions, as well as resources and markets far beyond its near perimeter. This demands the establishment and preservation of strategic connectivity. Thus, connectedness to the "exterior world" is the key imperative and determinant of Indian geopolitical thinking, defense strategy, and foreign policy.

As noted above, transformative ambitions are driving India into the global powers club, including its geo-economic dimension. New Delhi plans to project its economic power through sustained growth in exports. By 2030, it should increase at least twice, from the current \$1 trillion. The major share of exports (and imports) is destined by geography to flow via maritime communications—stretched, costly, and often exposed. Not surprisingly, India is pursuing more optimal transportation solutions, like new corridors and pillars of connectivity.

Pragmatism-Driven Policy, Threats-Prompted Strategy

Despite being an “island,” India has never been self-contained but rather always multi-vectored. Since being granted independence by the UK in 1947, it has implemented a proactive foreign policy whose fundamentals remain largely unchanged. The keywords to describe Indian foreign policy are strategic autonomy, balancing, multipolarity, neutrality, non-alignment, multi-layered connectivity, and technological (e.g., digital) sovereignty.

During the Cold War, New Delhi maintained cordial relations with both the West and the East and was one of the founders and undisputed leaders of the Non-Aligned Movement. That overall approach has remained largely intact whilst being boosted by elevated ambitions: to advance its economic and political influence globally and contain the impact of competing powers on India’s development. India’s rising economic and military muscle are the main force multipliers of those ambitions.

Nowadays, New Delhi instrumentalizes its foreign policy on two parallel tracks. The first (multilateral) track represents participation in a wide international and regional structures—the United Nations (India is an aspirant to a permanent seat on the UN Security Council), the G20 and G-77 groups, the Non-Alignment Movement, BRICS, and the Shanghai Cooperation Organization. The second (bilateral/minilateral) track embodies more limited structural formats, including two, three, or maximum four actors. Minilateral security formats with measured obligations are more appropriate for advancing its goal of achieving strategic autonomy and freedom of decision and action based on the primacy of own interests.

Such specific mechanisms include the Quadrilateral Security Dialogue (the Quad) encompassing the U.S., India, Australia, and Japan; the I2U2 (India, Israel, the UAE, and the U.S.); the “Solar Alliance” (India, France, and Greece); and various institutionalized security dialogues with states like France, Italy, Japan, Indonesia, South Korea, and Vietnam.

The concept of strategic autonomy enables New Delhi to pursue its interests that may contradict the policies of allies whilst remaining in productive relations with them on other tracks. The most well-expressed example of that pattern is the beneficial venture to buy sanctioned Russian oil at a low price, notwithstanding Western criticism.

The primary security concern for India remains China. The Sino-Indian border dispute remains an explosive matter potentially threatening a shooting war. To this may be added the Tibet problem. China also supports India’s sworn enemy, Pakistan. Moreover, Beijing actively implements its Belt and Road Initiative and its “String of Pearls” strategy—the formation of maritime trade routes protected by a chain of military bases across the Indo-Pacific Rim, including within the Indian strategic perimeter. India has developed its own counter strategy, known as the “Necklace of Diamonds.” The lyricism of the label

notwithstanding, the strategy focuses on the mitigation of India's ocean exposure, the protection of supply chains, and the hard-power containment of what it perceives to be an expanding China. It is being pursued together with concerned partners, impressive in their numbers and capabilities.

Other security concerns take account of what India believes to be the inherent instability of both Pakistan and Afghanistan, and China's emerging strategic penetration into Iran and the GCC. The ongoing European War is producing myriad global consequences, including the economic exclusion of Ukraine and the West-led sanctions and export restrictions regime against Russia that aggravate energy and food crises, which primarily affects the Global South. India is also actively worried about global financial stability, climate change, and cyber threats.

A particular concern for New Delhi is the multidimensional strategic alliance between Türkiye and Pakistan. India's perception of a given country is disproportionately shaped by its policy towards Kashmir. Ankara's hyper-activity regarding Kashmir and its pretensions on patronage over the Indian Muslim community has also caused further bilateral tension. Moreover, the Hindu nationalism of Prime Minister Narendra Modi and his ruling BJP party and the political Islam and pan-Turkism promoted by President Recep Tayyip Erdogan and the ruling AKP party represent two antagonist ideological matrixes.

It is impossible to cover all aspects of the Indian geopolitical partnership networks in this IDD Working Paper, as they are plentiful and extensive. Thus, an outlook on the most relevant associations will suffice for present purposes. Four individual actors require special attention, as they represent pillars of India's geopolitical connectivity to the European theatre. They are France, the United Arab Emirates, Greece, and Armenia.

The French Connection

France is a nation of the Indo-Pacific, as stated in the opening line of its 2019 "Defense Strategy in the Indo-Pacific"—in no small measure this claim rests on the fact that Paris has managed to retain some of its colonial-era possessions in that part of the world. It has vested security and economic interests in the region. For instance, French overseas island possessions in the Indian and Pacific oceans form 93 percent of its exclusive economic zone. France seeks out export-import markets and resources in the Indo-Pacific and thus feels that it needs to protect its sea lines of communication, including the logistical lifelines running to Europe from East and Southeast Asia and the Gulf. To those ends, France maintains a naval presence in the region and a constellation of military bases in Djibouti, the UAE, its island of Réunion, and its various Pacific territories. Paris's objectives in the region are the containment of China, competition with other powers (the U.S. and the UK included), and acknowledgment of its sought-after leading role in shaping and executing the EU's global policy.

India is France's key and natural ally in this regard. The initial 1998 partnership treaty has grown into a regular strategic dialogue and resulted in practical cooperation in the diplomatic, military, security, economic, and technological domains. The trusted personal relations between Modi and French President Emmanuel Macron strengthen that alliance. New Delhi and Paris have consolidated views on major international problems and support each other in public and backstage diplomacy. In the past two decades, France invested over \$10 billion into the Indian economy. The bilateral trade turnout volume reached \$12.42 billion in 2021-2022. France is the second largest defense production supplier for the Indian Armed Forces (up to 30 percent of the total share). It has secured lucrative \$8 billion contracts to supply India with the most sophisticated arms, such as Rafale jet fighters and Scorpene-class submarines. Most likely, France will fill the vacuum created by the recent compelled retreat of Russia from that market.

One of the utmost tasks of the Franco-Indian strategic partnership is the protection of maritime trade waterways, which both countries take very seriously. Strategic chokepoints hold exceptional significance in this regard, particularly the Malacca, Hormuz, and Bab al-Mandeb Straits. Both the Indian and the French navies actively cooperate and coordinate their activities, including merchant shipping escort operations, patrolling hazardous waters, and combating terrorism, piracy, and organized crime activity. Besides suppressing non-state threats, they also perform to “show the flag” in the Chinese navy's areas of core operational activity—a postmodern reincarnation of the infamous “gunboat diplomacy” of the nineteenth century.

UAE: The Gulf Pillar

The United Arab Emirates plays an important connectivity role in the aforementioned Franco-Indian nexus due to its regional role and geographic positioning between the European, African, and Indo-Pacific theaters. Both New Delhi and Paris have separate strategic agreements with the UAE, and institutionalized trilateral dialogues between foreign ministers and chiefs of staff of the armed forces.

The UAE's booming economy critically depends on maritime trade, including the export of oil and the import of commodities. That logic compelled the UAE to fight a war in Yemen (together with Saudi Arabia) and establish a military presence in nearby Somalia and Eritrea. The need to preserve freedom of navigation along shipping lines facilitates a close defense cooperation within the India-France-UAE triumvirate. In particular, the three states conduct regular naval exercises in the strategic waters in the vicinity of the Arabian Peninsula and the Horn of Africa, thus not only combating maritime piracy, but also sending a signal to China, Pakistan, and perhaps Iran.

The frequency of visits by the leaders of India and France the UAE indicates the strategic prominence of the latter: Modi has been to the UAE four times in 2015-2022, and Macron has visited three times in 2017-2022. Abu Dhabi, in turn, bets on Indian and

French support in the rapidly evolving geopolitical conditions in the Gulf caused by the Saudi-Iranian de-escalation, strategic uncertainty over Iran, and China's recent ventures in the region.

The UAE's ethnic Indian diaspora is an important enabler agent of the India-UAE link. It facilitates Indian trade and financial operations, including the import of discounted Russian oil via companies owned by its national in Dubai. The Indian influence contributed to the UAE's recent relative distancing from Pakistan.

Greece: The EastMed Pillar

Greece represents the Mediterranean link of the Franco-Indian strategic nexus, with the age-old Greek-Turkish antagonism providing a strategic background. Ankara's bid for the revision of international treaties and conventions, claims over the exclusive economic zones of Greece and Cyprus, the oil and gas seabed deposits in the Eastern Mediterranean, its militarized international behavior, as well as its proxy war in Libya have triggered a collective response. This response involves India, France, the UAE, and others.

In 2020-2021, a new regional security architecture aimed at the containment of Türkiye began to take shape. France and Greece entered what amounted to an alliance agreement that enabled Paris to provide Athens with direct defense aid for Greece to be able to maintain strategic balance with Türkiye (all three are NATO member states). In a parallel development, India, Greece, and the UAE initiated a trilateral strategic dialogue. Egypt, Saudi Arabia, and Cyprus are the other de-facto participants of that emerged informal configuration. Their collective military activities include numerous joint exercises in the Eastern Mediterranean and the Gulf, which involve ground, air, naval, and special operation forces' assets.

In that format, India is executing a long-range (transcontinental) force projection to the Eastern Mediterranean. The presence of Indian warships and submarines in that area is no longer an exception. Most recently, in April 2023, Indian Air Force SU-30 jet fighters landed at a Greek airbase to conduct yet another routine interoperability exercise with its partners. New Delhi fully backs Greece at the UN and other international bodies on issues involving Cyprus and the Aegean Sea. Not surprisingly, it is expected that Greece will emerge as one of the major Indian points of entry into the EU.

At a glance it appears that Türkiye's strategic alliance with Pakistan is a main reason behind India's alignment with Greece. However, there are other equally important motives, too. New Delhi often invokes its historical memory of how a rising Ottoman empire effectively took over the most vital junction of trade routes between the Indian Subcontinent and Europe in the fifteenth century. The strategic interest of twenty-first-century India is to keep that connection free of anyone's dominance.

Armenia: The South Caucasus Pillar

Yet another embryonic pillar of India's global outreach has emerged in the South Caucasus thanks to its burgeoning relationship with Armenia. Relations between New Delhi and Yerevan accelerated after the Armenian defeat in the Second Karabakh War in 2020 and are now steadily approaching a level of strategic partnership. That partnership has both geo-economic and politico-military dimensions.

As noted above, India's connection to global markets, particularly those in the EU, depends almost solely on maritime routes. Such routes are costly, lengthy, and are not necessarily secure. Due to this, New Delhi is searching for alternative (backup) directions for its export and import operations. One contemplated substitute is the multimodal Persian Gulf and Black Sea Transport Corridor (PBTC), once proposed by Iran. That hypothetical route starts in Mumbai and runs through the Iranian port of Bender Abbas and then overland into Iran and Armenia, towards the Black Sea coast of Georgia, and then to the EU. India shows a strong interest in developing such a hybrid (i.e., sea-land) itinerary due to the absence of other feasible options. Beyond the PBTC, India also aims to invest in economic and infrastructural projects in Armenia and incorporate the quite developed local IT-market into the orbit of its own digital industry.

Its view of Azerbaijan as a member of a trilateral strategic alliance involving Pakistan and Türkiye forms another of India's motivations to cooperate with Armenia. That adds a military dimension. In fact, India is now clearly working to help Armenia rebuild its military capabilities, which were crippled by the 2020 war. The already sealed arms deals—worth an impressive \$700 million—includes 155mm self-propelled and towed artillery, multiple-launch rocket systems, anti-tank guided missiles, weapon-locating radars, ammunition, and other items. Armenia's wish list reportedly includes surface-to-surface missiles, air defense systems, and unmanned aerial vehicles. India seeks to help modernize Armenia's obsolete Soviet-Russian weapon systems and even to create a localized cluster of its own military-industrial complex in that South Caucasus country (not only to feed the local demand but also to re-export production manufactured there to the countries of the Middle East and the Balkans). Both sides have established operational contacts at the general staff level and plan to exchange defense attachés soon. The potential establishment of some sort of an Indian military presence in Armenia looks unrealistic only if we forget that India set up a base in Tajikistan during the Afghan War in the 2000s.

Seen through the Armenian lens, an emerging alliance with India would strengthen its international security protection guarantees, sought after its 2020 defeat in order to gain time and regroup. Yerevan promotes the notion of a "civilizational partnership" with India (it was coined by Armenia's ambassador to India in April 2023), overemphasizes Azerbaijan's relations with Pakistan, and offers luring incentives for Indian investments into the PBTC and associated infrastructure (such as the planned "land port" in Gyumri). Developing ties with India is a win-win option for Armenia.

It will not likely result in objections from either Moscow or Tehran, as does potential Armenian cooperation with the West.

The emerging India-Armenia alignment may transform from a duo into a trio. Iran sustains its own multifaceted agenda concerning South Caucasus, which embeds into a broader strategy. Beyond the containment of an alleged Israeli “threat” and Turkish “expansion,” Iran is practically interested in forming the PBTC route. That interest leads to the proclamation of the principle of the “permanence” of the region’s state borders (a reference to Armenia) that Tehran supports by the threat of the use of force against Azerbaijan. The meeting of a working group of Armenian, Indian, and Iranian foreign ministry officials in Yerevan in April 2023 confirms the inception of a trilateral format.

There are other factors to keep in the field of vision. France is a leading Western power, supporting Armenia in every possible way. Alongside the political and humanitarian aspects, Paris views Armenia as a point of trans-regional connectivity that would provide an access to the Central Asian part of the Silk Road region—and, by extension, to India. That interest objectively induces both strategic allies—France and India—to combine their collective efforts in the South Caucasus by reinforcing Armenia. Additionally, it appears that Greece is strengthening its defense cooperation with Yerevan (notwithstanding its strategic energy partnership with Azerbaijan), with the apparent aim to counterbalance Türkiye. Could this potentially signal the emergence of another regional politico-military grouping?

Overall, the gravitation of Armenia towards India’s strategic orbit builds another pillar of geopolitical connectivity for the latter. However, that trend may negatively affect regional dynamics and strategic balance in the South Caucasus—especially if this would involve third parties, such as Iran.

Synopsis

- The Indo-Pacific region is shifting into the very epicenter of the global geopolitical, geo-strategic, geo-economic, and geo-cultural agenda.
- India is one of the mainstay actors of the Indo-Pacific.
- Its existing and emerging capabilities and capacities place India in the cohort of powers with truly global relevance and influence.
- India’s geopolitical interests rest on its requirement to facilitate strategic trans-regional and transcontinental connectivity to spatially distant regions of the world.
- For that purpose, India—together with other equally interested actors—is building a system of geographically distributed but still tightly networked configurations.
- The logic of those configurations differs from well-structured and hierarchically organized “classical” alliances, and rests on premises of commonality of interests, historical experience of collaboration, and shared perceptions of threats and antagonists.

- The architecture of India’s geopolitical alignments includes (but is not limited to) France, the United Arab Emirates, Greece, and, more recently, Armenia.
- India perceives the above actors as points of geopolitical connectivity, or, in other words, pillars of the “bridge” linking it to the European continent.
- One of the particular outcomes of this perception is the emerging politico-military configuration in the South Caucasus that involves and may affect the present strategic balance in that region.
- The next general elections in May 2024 may change the government in New Delhi but would hardly alter the geopolitical vision of India, which remains enduring.

The concluding observation is on how Azerbaijan should treat India, especially in light of Delhi’s deepening engagement with Yerevan. India matters. It is a pragmatic and reasonable actor, not a zero-sum gamer. It has stakes and legitimate interests worldwide, ensuing its growing global desires. Azerbaijan—given its key geopolitical location, natural resources, and multicultural environment—can offer India a lot. Apart from moments of shared history, there are positive instances of bilateral cooperation in the present time. Just one little known fact: Azerbaijan’s first ever Earth observation satellite was launched into space in June 2014 by the Indian Defense Research and Development Organization. Bilateral cooperation has an immense latent capacity, and India should not remain a blank spot on the map of Azerbaijan’s foreign policy priorities.