



**FRIEDRICH NAUMANN  
FOUNDATION** For Freedom.  
India

**Kalinga Kusum**  
Empowerment through Education and Enterprise

# **Geopolitics, Security, Economy: How the New Superpower India Thinks**

Stefan Schott

ANALYSIS

# Imprint

## **Publisher**

Friedrich Naumann Foundation for Freedom India  
USO House 6, Special Institutional Area New Delhi 110067

[www.freiheit.org/india](http://www.freiheit.org/india)

## **Authors**

Stefan Schott  
Country Director  
Friedrich Naumann Foundation for Freedom, India

## **Editors**

Bipin Ghimire  
Political Analyst  
Friedrich Naumann Foundation for Freedom India

## **Partner Organization**

Kalinga Kusum Foundation (KKF)

## **Opinion Research Institute**

Rajneethi

## **Contact**

Phone: +91 11 41688149, 41688150  
Email: [india@freiheit.org](mailto:india@freiheit.org)

## **Date**

January 2026

## **Notes on using this publication**

This publication is an informational document from the Friedrich Naumann Foundation for Freedom. It is available free of charge and is not intended for sale. It may not be used for promotional purposes by political parties or election officials during elections (federal, state, or local elections, or elections to the European Parliament).

## **License**

Creative Commons (CC BY-NC-ND 4.0)

# Contents

<b>Foreword</b>	<b>4</b>
<b>1. Executive Summary</b>	<b>5</b>
<b>2. India's Rise</b>	<b>7</b>
2.1. Demographics	7
2.2. Economy	8
2.3. Politics	9
<b>3. Methodology</b>	<b>13</b>
<b>4. India's Interests</b>	<b>14</b>
<b>5. India's Partners</b>	<b>19</b>
5.1. USA	19
5.2. China	20
5.3. Russia	21
5.4. European Union	24
5.5. Germany	27
5.6. International Organizations	29
<b>6. India's Challenges</b>	<b>31</b>
6.1. Security	31
6.2. Economy	35
6.3. Migration	40
<b>7. Conclusions and Recommendations</b>	<b>42</b>

# Foreword

The global order is in flux—more rapidly and radically than most of us ever thought possible. The bipolar balance of power during the Cold War and the unipolar world order of the 1990s and 2000s ensured stability for many decades. Now they no longer exist. Many experts today speak of a multipolar order. Yet, the term is hardly suitable for understanding the new balance of power in the world.

More helpful is the model coined by political scientist Herfried Münkler. A new world order with five key players: the United States, Europe, Russia, China, and India. Münkler calls this order a pentarchy.

Put simply, in this system, the Western democracies of the U.S. and Europe stand on one side, and the autocracies of Russia and China on the other. Added to this is India, a new power that is difficult to categorize.

It is certainly worth debating whether the bloc of democracies comprising the U.S. and Europe still has much in common in light of current geopolitical developments, and whether Russia and China actually form a common camp. But that is not the issue here. This study aims to contribute to a better understanding of the fifth world power: India.

In Germany and Europe, knowledge about India remains very limited and is often distorted by stereotypes. The world's most populous country, the largest democracy with a booming economy and a leading IT hub—that is usually the extent of it.

But what are India's goals, what are its ambitions on the global stage, what values does it uphold, what is India's relationship with other global powers, and what security challenges does the country face? To answer these questions, the Friedrich Naumann Foundation for Freedom, and the Indian Kalinga Kusum Foundation commissioned the polling institute Rajneethi to conduct a survey of Indian decision-makers and opinion leaders.

The results, now available, are intended to contribute to a deeper understanding of India, foster realistic expectations, and strengthen the partnership with a country that will play a decisive role in shaping the future of the world order.

**Stefan Schott**

**Country Director**

**Friedrich Naumann Foundation for Freedom,  
India**

# 1. Executive Summary

India views its continued economic rise as a top priority and regards Europe as a key partner in this endeavor. From India's perspective, the European Union is the most important partner in terms of shared values on a global scale and is viewed as a strategic counterweight in light of the trade conflict with the United States. These findings emerge from a survey of nearly 1,400 representatives from India's political, business, and academic sectors, conducted on behalf of the Friedrich Naumann Foundation for Freedom and the Indian Kalinga Kusum Foundation.

The study's findings provide deep insight into the strategic direction of an emerging economy that is gaining increasing importance in global politics. As the world's most populous country and one of the leading economic powers, India is calling for greater participation in international organizations and positioning itself as the voice of the Global South. Its aspirations for a global leadership role are high: nearly 70 percent firmly expect the country to rise to the status of a world power within two decades. At the same time, the majority is in favor of reevaluating India's traditional non-aligned stance.

The primary goal here is clear: given a gross domestic product of \$2,800 per capita, respondents view economic development and poverty reduction as the most important strategic priorities. The situation on the labor market is seen as the country's greatest challenge. Foreign policy is therefore primarily interpreted as an extension of economic policy. The expectation that diplomacy will promote trade relations and growth dominates all other foreign policy motives, with 44 percent in favor. This suggests that India primarily seeks international partners based on whether they

can serve its domestic modernization agenda and the goal of poverty reduction.

The European Union is well-positioned in this regard. More than two-thirds view Europe as a model for India's own rise. The social market economy is by far the preferred economic model. Furthermore, the EU is credited with the greatest alignment on values such as democracy and the rule of law. Compared to the U.S., which scores relatively low on trust, Europe is considered significantly more reliable and is also more frequently cited as a key partner.

This shows that, in light of trade tensions between India and the United States, the EU is seen as a key alternative. Three-quarters of respondents view a free trade agreement with the EU as the right strategic response to the tariff dispute with the United States. Overall, there is strong support for further market liberalization and integration into regional trade alliances.

There is also great interest in India in deepening relations with Germany. Nearly 90 percent of respondents advocate for further rapprochement. Particularly pronounced is the desire for Germany to open its doors more widely to Indian students and workers. India also wants Germany to be more independent from the United States—and hopes for support in its quest for a permanent seat on the United Nations Security Council.

China is widely perceived in India as a systemic rival and a security threat—although the majority expresses great respect for the economic achievements of its neighbor. Trust in the government in Beijing is minimal—despite the recent warming of relations between the

two countries. Cooperation between China and Pakistan is viewed as particularly threatening. Concerns about military conflict are real. More than two-thirds consider an escalation of existing border disputes likely.

India views Russia as its most important partner on security issues. Trust in this decades-long partnership remains very strong. Two-thirds of respondents see the government in Moscow as the country most likely to provide support in the event of a military conflict. The overwhelming majority want to maintain the oil deals with Russia that have been criticized in the West.

The results explain why it is unrealistic to expect India to end its cooperation with Russia in the foreseeable future. At the same time, the survey also shows that Russia's economic potential is viewed as very limited—which, from India's perspective, makes alternative partnerships necessary.

Weaknesses have also been identified when it comes to the European Union. From an Indian perspective, Europe is falling behind the United States and China economically and technologically. There is also little confidence in the EU's military capabilities. Cooperation in the areas of skilled migration and educational collaboration, however, appears particularly promising. For Indians who wish to leave their country for professional reasons or to pursue higher education, Europe is by far the most popular destination.

## 2. India's Rise

India's first prime minister, Jawaharlal Nehru, had already described it as inevitable that India would play a central role in world politics. In a keynote speech on foreign policy<sup>1</sup> in 1949, he said this was not driven by ambition, but by "the force of circumstances." Three-quarters of a century later, it is abundantly clear what he meant by that.

With a population of nearly 1.5 billion, India has become the most populous country in the world. In recent years, its economy has grown faster than that of any other major industrialized or emerging nation. At the same time, India's voice in global politics is gaining weight—including as an advocate for the Global South within the G20 and the BRICS nations, where India is pushing for greater participation.

India's rise to become a global heavyweight is thus no longer a prediction but has long since become a reality. For the global economy, the country is a crucial driver of growth. Geopolitically, observers see India playing a key role in shaping a new world order.

### 2.1. Demographics

According to United Nations estimates<sup>2</sup>, India surpassed China as the world's most populous country in 2023. According to these projections, the country's population will reach 1.48 billion in 2026. This means that more than one-sixth of humanity will live in the country between the Himalayas and the Indian Ocean. While China's

population is shrinking, India's continues to grow. According to UN projections, India will remain the most populous country for the rest of this century—peaking at around 1.7 billion people, which the country will reach in the 2060s<sup>3</sup>.

India's population is notably young. According to the UN, the median age is currently 29. In other major economies, it is significantly higher: in China, it is just under 41, and in Germany, just under 46.

Thanks to its young demographic profile, India's labor pool ranks among the largest in the world. The country currently has approximately one billion people of working age (15 to 64)—slightly more than China<sup>4</sup>. By 2050, the balance of power will shift further in India's favor. It is expected that by then, India will have more than 1.1 billion people of working age, while China's population in this age group will fall to below 800 million<sup>5</sup>.

India thus has the opportunity to reap a demographic dividend in the coming decades. The large pool of available labor offers significant potential for economic productivity, provided that adequate jobs can be created.

---

<sup>4</sup> Lowy Institute Asia Power Index – Working Age Population Baseline

<sup>5</sup> Lowy Institute Asia Power Index – Working Age Population Forecast 2050

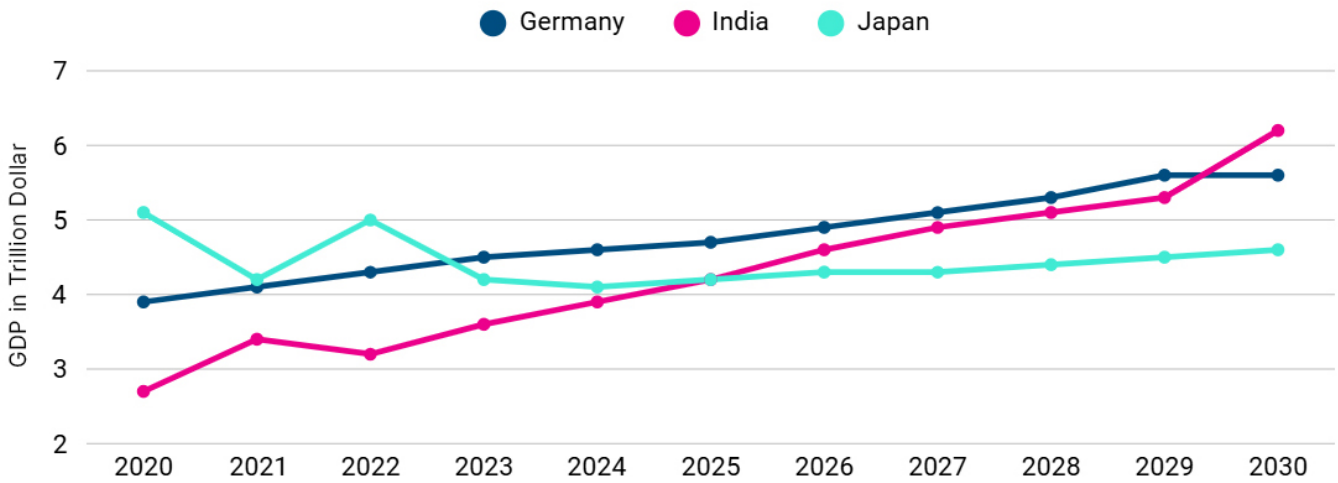
---

<sup>1</sup> Nehru Archive: The Need for an Independent Foreign Policy

<sup>2</sup> UN World Population Prospects 2024

<sup>3</sup> UN World Population Prospects 2024 – Summary of Results (PDF)

**Figure 1 | India’s economic output surpasses Japan’s**  
Gross Domestic Product of Selected Economies (Forecast)



Source: IMF World Economic Outlook (October 2025)

## 2.2. Economy

The year 2026 is expected to mark a new milestone for India: The International Monetary Fund (IMF) forecasts<sup>6</sup> that India’s economic output will exceed Japan’s gross domestic product for the first time this year.

India will thus become the world’s fourth largest economy. According to IMF data, India’s economy will also surpass Germany’s by the end of the decade. India will then establish itself as the world’s third-largest economic power—behind the U.S. and China. This reflects a rapid shift in the global balance of economic power: in 2010, India was still ranked 10th on the list of the world’s largest economies

The government in New Delhi has also set ambitious goals for the coming decades: It aims to make a “developed India” (“Viksit Bharat”)

a reality by 2047—the 100th anniversary of independence. The government think tank, NITI Aayog, considers it realistic that economic output could increase sevenfold to \$30 trillion by then<sup>7</sup>. For 2026, the IMF forecasts economic growth of 6.2 percent in India<sup>8</sup>.

India’s economic growth has been accompanied by a significant increase in prosperity. According to World Bank data<sup>9</sup>, per capita income has more than sextupled since the turn of the millennium, rising from around \$440 to \$2,700 a year. This is also giving rise to an increasingly affluent middle class that can afford to spend beyond basic necessities. The consulting firm Deloitte forecasts<sup>10</sup> that by 2030, around half of all households will belong to the upper middle class—with an inflation-adjusted income of more than \$8,500 per year. In 2018, fewer than one in four households belonged to this group.

6 IMF Data Mapper – GDP Comparison: Germany, Japan, India

7 Invest India – India’s Target to Become a \$30 Trillion Economy

8 IMF World Economic Outlook, October 2025

9 World Bank – India GDP Per Capita

10 Deloitte Insights – India Economic Outlook

There has also been strong growth at the top end of the wealth distribution: the number of dollar billionaires has doubled since 2020 to more than 200<sup>11</sup>. This means that only the U.S. and China have more billionaires than India, which is also home to Asia's richest man, Mukesh Ambani.

This upswing is being driven by massive investments in infrastructure. In recent years, India's railways have put more than 160 modern high-speed rail lines into service<sup>12</sup>. Since 2014, the country has also built an average of more than 5,000 kilometers of new highways annually<sup>13</sup>. This means that every two to three years, expressways equivalent in length to the entire German highway network are added. The number of airports has more than doubled since 2014. At the same time, India also boasts a digital infrastructure that serves as an international model: the real-time payment system UPI is considered the largest in the world<sup>14</sup>. Thanks to affordable rates and widespread network expansion, India's smartphone users lead the world in mobile data usage<sup>15</sup>.

The modernization of the Indian economy is also drawing the attention of international companies that use the country as a manufacturing hub. A prominent example is the electronics giant Apple, which has shifted a significant portion of its iPhone production from China to India. India, which barely manufactured any mobile phones just a decade ago, has risen to become the world's second-largest producer, in part for this reason<sup>16</sup>.

India is also becoming increasingly important in trade with Germany. The volume of goods trade nearly doubled between 2014 and 2024, reaching more than 30 billion euros. A free trade agreement between the European Union and India could further boost economic exchange.

### 2.3. Politics

India's growing economic strength goes hand in hand with an increasing desire to shape the international order. The government in New Delhi views the world order of recent decades as facing a fundamental upheaval, which, from India's perspective, will lead to an end of Western dominance. As an alternative, the country envisions a multipolar world order in which it itself becomes a key international player alongside power centers such as the U.S., China, the EU, and Russia.

In this context, political scientist Herfried Münkler refers to a multipolar "system of five." Within this framework, he views India as a balancing force between a democratic bloc comprising the United States and Europe and an authoritarian bloc comprising China and Russia.

India's role as a balancer between the poles stems from its foreign policy principle of non-alignment. India adopted this approach as early as the Cold War era, with the aim of avoiding becoming a pawn of the superpowers, the United States and the Soviet Union, and of being drawn into foreign conflicts. This later evolved into the concept of strategic autonomy, which shaped Indian foreign policy after the collapse of the Soviet Union. India's goal is to be able to make decisions in a multipolar world based purely on national interests, without being constrained by alliance obligations.

<sup>11</sup> Forbes – The 10 Richest Indians 2025

<sup>12</sup> Press Information Bureau – Government of India (PRID 2204799)

<sup>13</sup> Press Information Bureau – Government of India (PRID 2209837)

<sup>14</sup> Press Information Bureau – Government of India (PRID 2200569)

<sup>15</sup> Business Today – India Dominates Global Mobile Market

<sup>16</sup> Press Information Bureau – Government of India (PRID 2099656)

India is walking a tightrope between rival power blocs. For example, the country is involved both as a member of the Western-oriented Quad group alongside the U.S., Australia, and Japan, and as part of the BRICS group and the Shanghai Cooperation Organization (SCO), in which the government in New Delhi cooperates with China and Russia, among others. India is thus pursuing different goals: While the Quad group is designed to counterbalance China's military dominance in the Indo-Pacific, India uses organizations like BRICS to advocate for a multipolar world order in which the Global South has a greater say.

Unlike China and Russia, India avoids anti-Western rhetoric within the BRICS and the SCO<sup>17</sup>. Nevertheless, India's so-called "multi-alignment" with various power blocs poses a challenge for the West in deepening relations. This became particularly clear after the start of Russia's war of aggression against Ukraine. While European nations pushed for Russia's international isolation, India continued its "special and privileged strategic partnership" with the country. The government in Moscow has been a close ally of India for decades and its most important supplier of arms. After the start of the war in Ukraine, both countries also deepened their energy partnership: India became, alongside China, the most important buyer of Russian oil, which could hardly find any buyers in the West.

For India, the costs of multi-alignment have become increasingly apparent in recent times. Since last year, the U.S. government has been pressing the government in New Delhi to end its oil deals with Russia. In August, it raised its tariff on Indian goods from 25 to 50 percent, citing allegations that India was fueling the

Russian war machine. The European Union also described India's oil deals with Russia and the two countries' joint participation in military exercises as an obstacle to deepening relations<sup>18</sup>.

However, the idea that India will turn away from Russia in the face of criticism from the West is considered unrealistic. The government in New Delhi also views its partnership with Russia as a key safeguard against threats to its own security. For one thing, the country remains dependent on military equipment and spare parts for military use from Russia. For another, India hopes that maintaining good relations with Moscow will prevent Russia from aligning itself too closely with the government in Beijing<sup>19</sup>.

India views China's growing strength as its greatest geopolitical challenge. For decades, the two countries have been locked in territorial disputes over their 3,500-kilometer border, which have repeatedly led to military confrontations. During clashes in the Galwan Valley in 2020, soldiers from both countries were killed. The incident led to a massive deterioration in Indo-Chinese relations. In India, Chinese apps were banned and restrictions were placed on Chinese investments. For years, there were no direct flights between the two countries.

Recently, there has been a renewed warming of relations between the two countries. In late August 2025, Indian Prime Minister Narendra Modi made his first visit to China in seven years and held a bilateral meeting with Chinese President Xi Jinping on the sidelines of the SCO summit in Tianjin. Both

---

<sup>17</sup> SWP Berlin – India as a Partner of German Foreign Policy

---

<sup>18</sup> EU External Action Service – High Representative Press Remarks  
<sup>19</sup> SWP Berlin – Research Paper 2024/A58

sides emphasized that they were partners, not rivals<sup>20</sup>. Observers viewed the end of the diplomatic ice age between the two countries against the backdrop of the US tariffs imposed shortly before, which are putting pressure on India to carve out economic space for itself in other markets.

However, mutual mistrust between China and India persists despite the thaw in relations. Among other things, India is concerned about China's growing influence in other South Asian countries—particularly with regard to its archrival Pakistan, which maintains close ties with Beijing. The fear of an escalation is not abstract: the last serious military conflict between India and Pakistan, lasting several days, occurred in May 2025.

India is responding to the ongoing perception of threats in its neighborhood by expanding its military capabilities. The defense budget has recently been significantly increased<sup>21</sup>. Plans include commissioning another aircraft carrier and building new submarines. The government is also working to strengthen domestic arms production and thus become less dependent on imports. Compared to China, India is still considered significantly weaker militarily. Indian defense spending recently amounted to less than one-third of China's military budget<sup>22</sup>.

The government in New Delhi expects its European partners to show more understanding for India's own geopolitical challenges, rather than being lectured, for example, on its relationship with Russia. Foreign Minister S. Jaishankar said as early as 2022 that Europe must move beyond the mindset that Europe's problems are the world's problems, but that

the world's problems are none of Europe's business.

His statement resonated in Europe. EU member states have recently expressed their determination to work more closely with India in order to prevent the country from being pushed into Russia's orbit<sup>23</sup>. U.S. trade policy also reinforces the mutual interest in closer ties. In light of new U.S. tariffs, both the EU and India are seeking to strengthen alternative trade partnerships.

The EU-India Strategic Agenda<sup>24</sup> presented by the EU in 2025, also aims to strengthen cooperation in the areas of technology and innovation, connectivity, and security and defense. One of the goals of European policy is to reduce India's dependence on Russian military equipment. Germany also intends to cooperate more closely with India in the defense sector<sup>25</sup>, including on a submarine project that is expected to involve technology transfer to India<sup>26</sup>.

The EU is also calling for closer cooperation in the face of climate change. Given its sheer size alone, India is a key partner on climate issues. From India's perspective, the U.S. withdrawal from the Paris Climate Agreement makes Europe the central supporter on the path to climate neutrality.

The potential for cooperation in the area of skilled migration also appears particularly significant. While India suffers from comparatively high youth unemployment<sup>27</sup>,

<sup>20</sup> Reuters – India and China Are Partners, Not Rivals: Modi-Xi Meeting

<sup>21</sup> Reuters – India's Defence Budget

<sup>22</sup> Lowy Institute Asia Power Index – Military Defence Spending

<sup>23</sup> EU External Action Service – High Representative Press Remarks

<sup>24</sup> European Council – New Strategic Partnership (Press Release)

<sup>25</sup> German Federal Ministry of Defence – Deepening Military Cooperation with India

<sup>26</sup> TKMS Group – Milestone in Indian Submarine Programme

countries in Europe often lack young talent. Indian skilled workers are becoming increasingly important for the German labor market. Following the enactment of the Skilled Immigration Act in 2020, the number of Indians living in Germany nearly doubled, from around 150,000 at that time to approximately 280,000 most recently. According to data from the Federal Employment Agency, the number of Indian nationals employed in Germany in jobs subject to social insurance contributions rose.

Employment will increase even more sharply, from around 64,000 in 2020 to just under 170,000 in June 2025<sup>28</sup>.

Europe has recently come into sharper focus as a destination for highly qualified Indian professionals, in part because the U.S. has severely restricted the issuance of so-called H-1B visas. This measure particularly affects Indian citizens, who have made the most use of this visa category. Germany presents itself as a counterexample. "Our migration policy is reliable, modern, and predictable," said the German ambassador to India, Philipp Ackermann, in a video aimed at Indian professionals. "We don't fundamentally change our rules overnight."

---

<sup>27</sup> Bloomberg – India Must Grow Twice as Fast

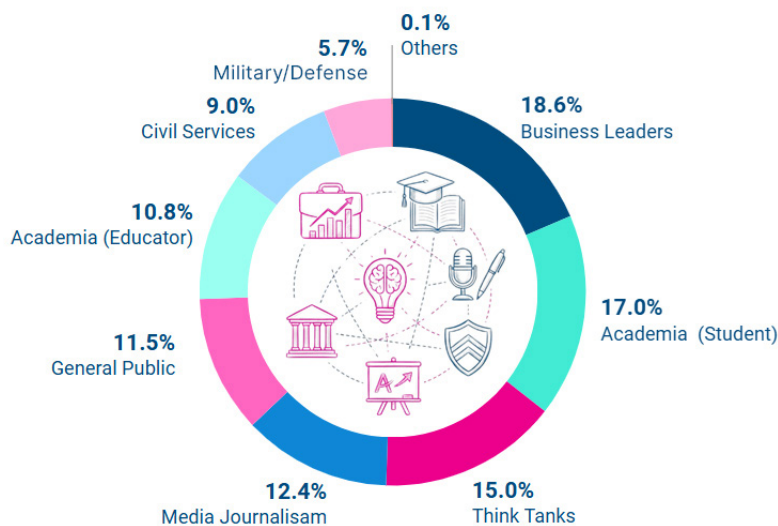
<sup>28</sup> German Federal Employment Agency – Interactive Labour Statistics

### 3. Methodology

This study is based on a structured quantitative survey conducted between November 17 and December 22, 2025. A total of 1,396 people, including business leaders, academics, students, representatives of think tanks, media professionals, defense experts, public servants, and informed citizens. The results therefore do not reflect the opinion of the general population, but rather the views of the urban and educated elite who actively shape or influence India’s foreign policy. The respondents include 883 men, 511 women, and two individuals who did not wish to disclose their gender. Forty-three percent of the survey participants are between the ages of 25 and 35 years old, and 17 percent are between 36 and 45 years old. The age group over 46 accounts for about 40 percent of the respondents.

The questionnaire included 46 core questions on topics such as national priorities, geopolitical orientation, economic strategy, perceptions of security, and demographics. Data was collected in 25 major metropolitan areas across the country. 451 of the interviews were conducted in South India. This was followed by 325 interviews in North India and 300 surveys in the West. There were also 170 interviews in East India, 90 in Central India, and 60 in the Northeast. The survey used a mixed-methods approach combining online and in-person interviews. Each interview followed established ethical guidelines. Respondents consented to participate in the study. Their responses are treated anonymously. Appropriate data protection measures were implemented.

**Figure 2 | Decision-makers and opinion leaders**  
Professional Background of Survey Participants



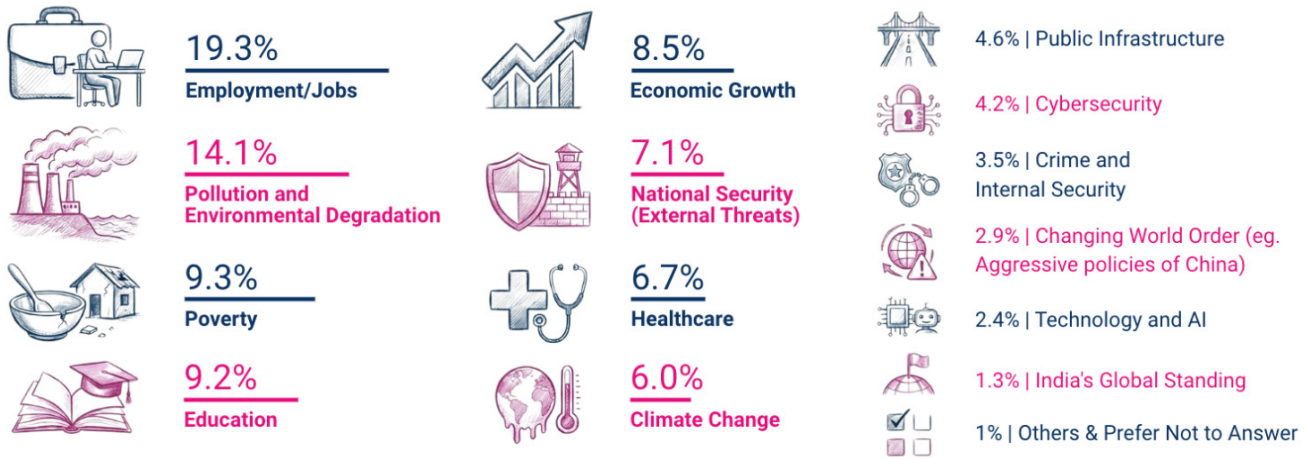
## 4. India's Interests

Despite India's strong economic growth, most respondents view the labor market as the nation's greatest emerging challenge. At 19 percent, concern about jobs tops the list of problems. Surprisingly, it is followed by the fear of environmental pollution (14 percent),

which thus ranks even ahead of traditional development issues such as poverty and education (both nine percent). Despite geopolitical tensions, national security plays a subordinate role in this direct comparison, at seven percent.

**Figure 3 | Concern about jobs takes center stage**

Question: In your opinion, what are the biggest challenges facing India today?



When asked what India's most important strategic interest is at present, most respondents cited India's continued economic development and the fight against poverty. Twenty-nine percent view these as the country's top strategic priorities. However, close behind at 27 percent, is the desire to maintain strategic autonomy and non-

alignment. Dealing with conflicts in India's neighborhood is cited significantly less often as a primary goal. Similarly, strengthening relations with the U.S. plays only a minor role as a primary strategic goal, with seven percent of respondents citing it.

**Figure 4 | Focus on Prosperity and Independence**

Question: What is India's most important strategic interest at present?



In line with economic development as the primary strategic goal, there is also an expectation that policymakers will leverage India's growing international influence to promote prosperity within the country. Thirty-three percent view this as the main task. Then comes the aspiration to act as the voice of the Global South against global inequality (21

percent). Traditional Western expectations of a major power find less resonance: neither the defense of the multilateral order (16 percent), nor the role as a diplomatic peacemaker (14 percent), nor as a democratic role model (13 percent) are seen as priority tasks.

**Figure 5 | Economy over World Politics**

Question: How should India primarily use its growing international influence?

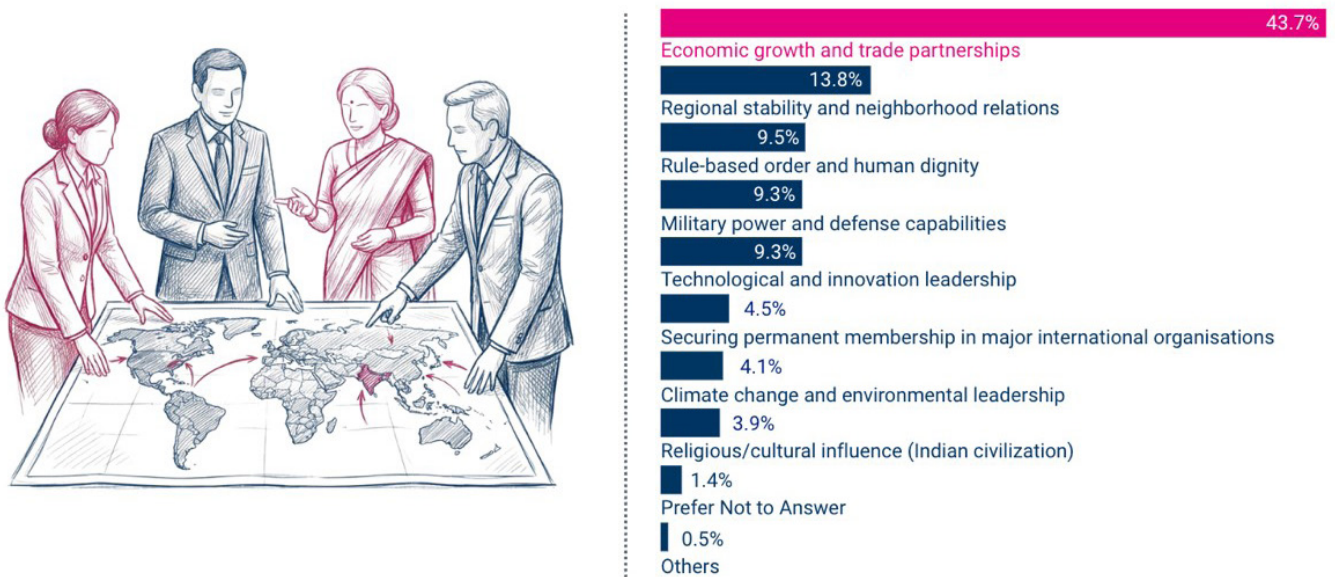


From India’s perspective, foreign policy is first and foremost an economic policy. With 44 percent, the goal of “economic growth and trade partnerships” dominates the list of priorities unchallenged, leaving all other diplomatic goals far behind.

Geopolitical tasks such as ensuring regional stability (14 percent) or expanding military power (nine percent) are viewed as significantly less urgent. Ideological values such as defending a rules-based order (ten percent) also play only a minor role.

**Figure 6 | Foreign Policy as an Economic Driver**

Question: What should be the top priority of Indian foreign policy?

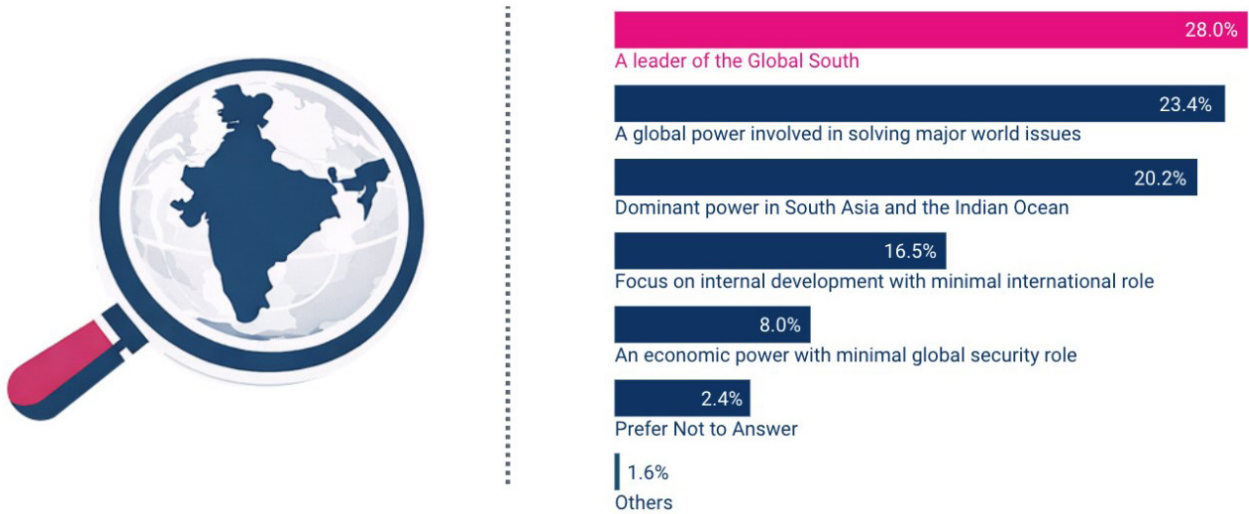


The vast majority of respondents view India as a leading power with international aspirations. Twenty-eight percent see the country primarily as the voice of the Global South, 23 percent as a world power that actively contributes to resolving global crises and 20 percent see

India as a dominant regional power in South Asia and the Indian Ocean. Only 17 percent support an isolationist course focused solely on domestic development. Nor does the role of a purely economic power with no security ambitions (eight percent) find much support.

**Figure 7 | Leadership Ambitions in the Global South**

Question: What should India’s primary role be in international relations?

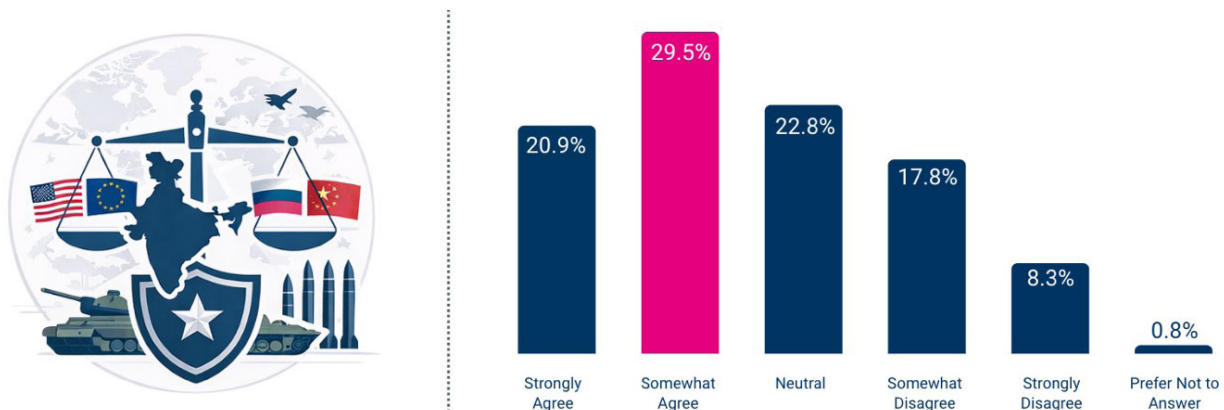


In light of the global rise in military conflicts, the traditional dogma of Indian foreign policy is beginning to crumble. Fifty percent of respondents believe that India should rethink its long-standing strategy of non-alignment. Only about 26 percent oppose a change in direction.

The results suggest that the geopolitical upheavals of recent years have also sparked a fundamental debate about India’s future course. The balancing act between the blocs is apparently increasingly seen as a challenge in India.

**Figure 8 | Openness to Alliances**

Statement: India should reconsider its long-standing stance of non-alignment and strategic autonomy in light of rising military spending and conflicts.

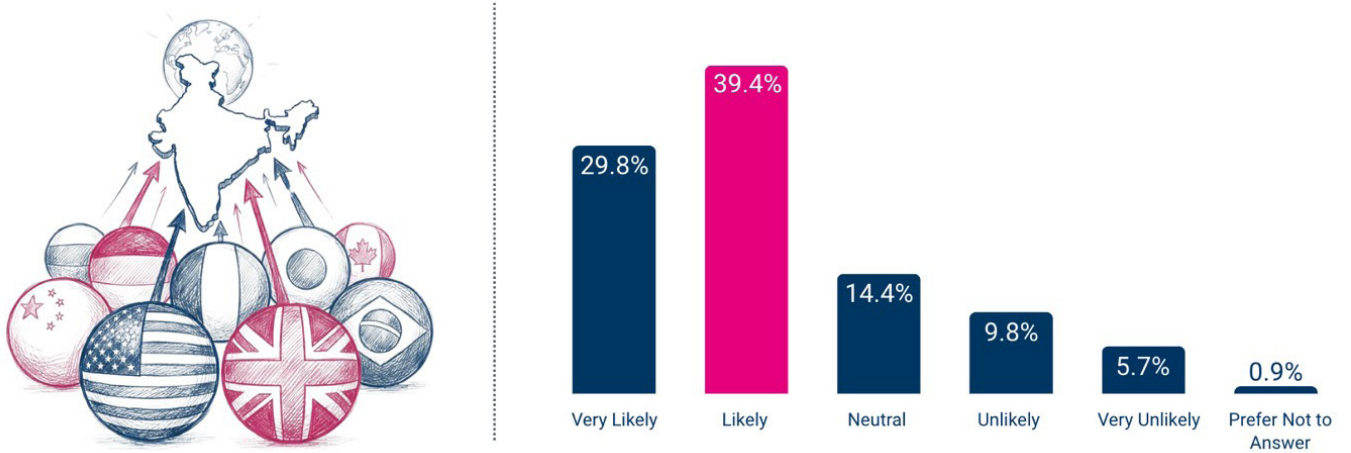


Belief in India's rise to world power status is strong. Nearly 70 percent of respondents consider it likely that India will achieve this status within the next 20 years. Doubts about this are rare. Only around 16 percent consider

this scenario unlikely. These figures reflect a deep sense of national self-confidence that has already firmly established the country's future status as a global heavyweight.

**Figure 9 | Strong Ambitions for Global Power**

Question: How likely is it that India will rise to become a true world power in the next 20 years?



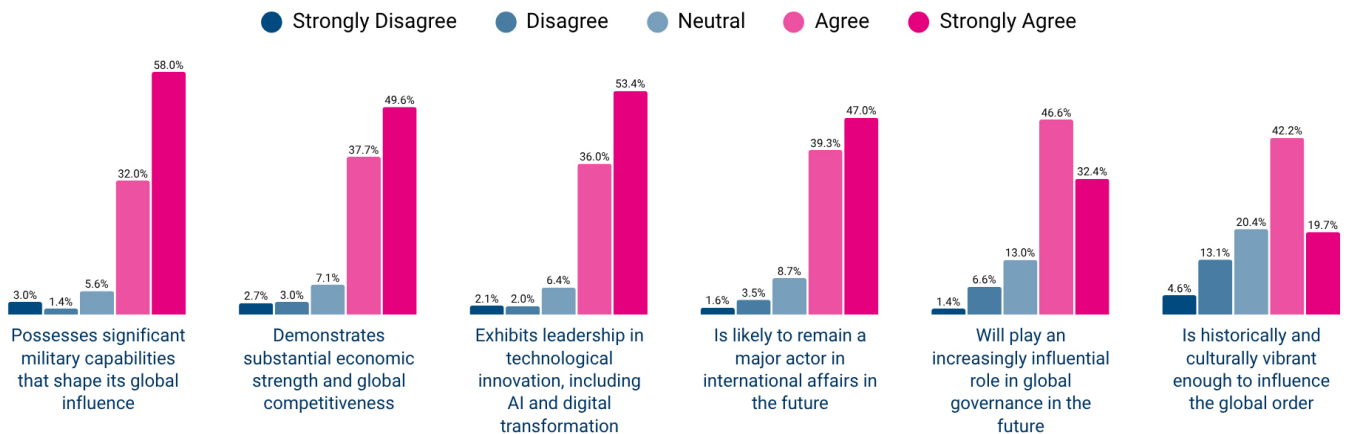
## 5. India's Partners

### 5.1. USA

The United States is viewed in India as an economically powerful military power. Ninety percent of respondents agree with the statement that the country possesses significant military capabilities that shape its global influence. No other major power enjoys a comparably strong public perception as a military power in the survey. The view of the U.S. economy is similarly positive: 87 percent consider the U.S. to be economically strong and globally competitive. Eighty-nine percent see the country as a leader in technological innovations such as artificial intelligence, among others.

A majority of respondents (86 percent), therefore, assume that the U.S. will remain a major player in international affairs in the future. Less clear is the confidence in the U.S. as a shaping power. Seventy-nine percent see the United States as playing an active role in shaping global rules and institutions. This result may be linked to the U.S. withdrawal from multilateral organizations during the administration of U.S. President Donald Trump. America's cultural and historical influence is perceived as even weaker. Only 62 percent of respondents believe that the U.S. can influence the world order at this level of "soft power."

**Figure 10 | Economically Strong Military Power**  
Assessment of the United States' geopolitical influence

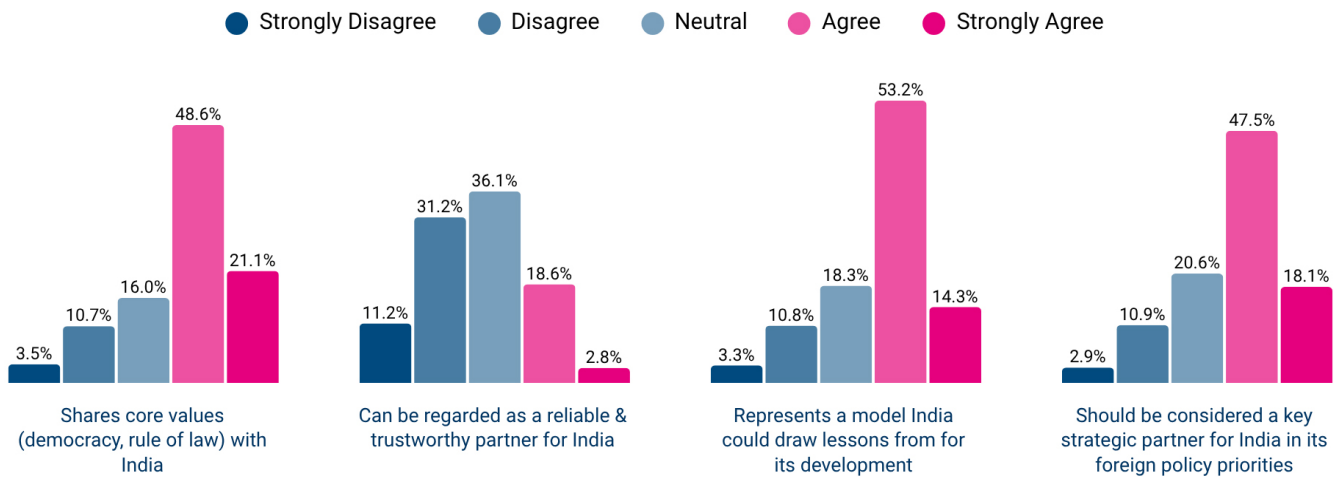


India's relationship with the United States is marked by deep ambivalence. On the one hand, there is a broad ideological foundation: 70 percent of respondents view the United States as a partner that shares core values such as democracy and the rule of law. The United States also continues to serve as a role model—68 percent consider the American model instructive for India's own development, and two thirds (66 percent) regard the government in Washington as a key strategic partner.

Yet, this closeness stands in sharp contrast to perceived reliability. Only a minority of 21 percent considers the U.S. a trustworthy partner, while 42 percent explicitly disagrees. The results reflect the deterioration in Indo-American relations that occurred last year, among other things, due to American tariff hikes and visa restrictions. They highlight a strategic dilemma: While the U.S. is viewed in India as indispensable and a partner sharing common values, it is simultaneously regarded as politically unpredictable.

**Figure 11 | A values-based partner with a credibility problem**

Assessment of the US as a Partner for India



## 5.2. China

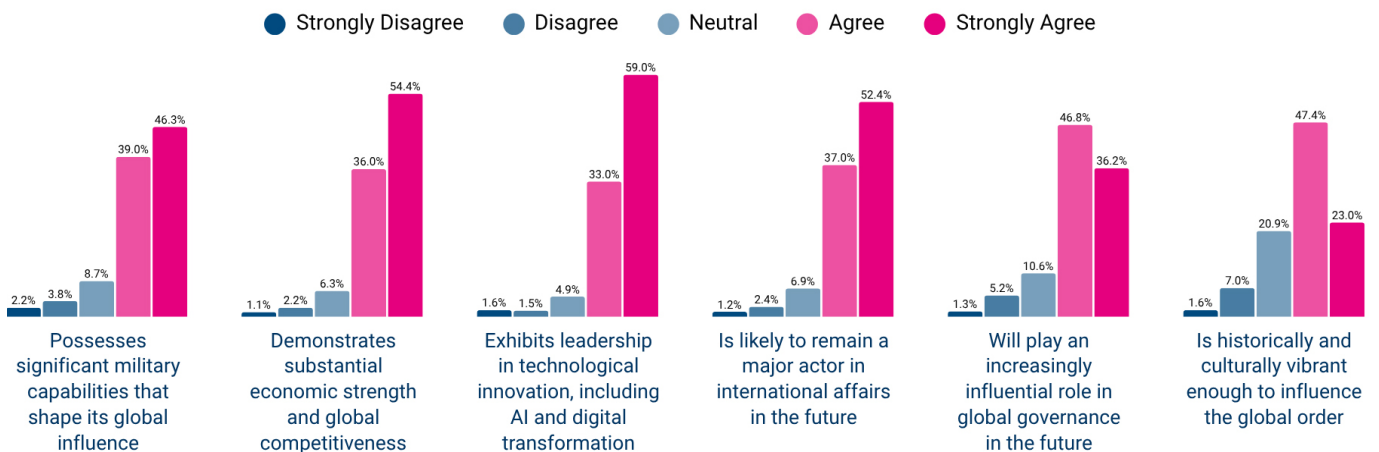
When asked to assess India’s relations with China, India’s northern neighbor is rated as a leading global power across all dimensions surveyed. Eighty-five percent of respondents view the country as globally influential in military terms, slightly less than the figure for the United States. In all other areas, trust in China is higher even compared to Russia and the European Union. Ninety percent view China as economically strong while 92 percent

believe the country plays a leading role in technology. Seventy percent consider the country to be a global cultural influence.

A large majority of respondents (89 percent) expect China to continue to assert itself as a geopolitical heavyweight. Slightly fewer, 83 percent, view the country as increasingly important in the further development of the global governance system.

**Figure 12 | Economic Giant and Technology Leader**

Assessment of China’s Geopolitical Influence

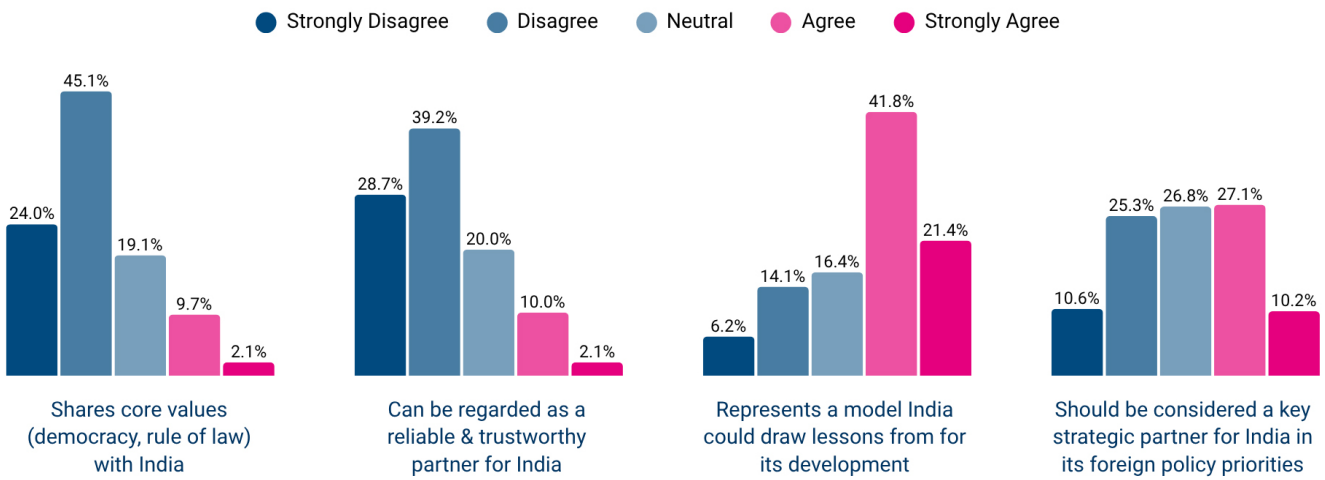


Perceptions of China are marked by a sharp divide between political rejection and a pragmatic interest in learning. Only 12 percent of respondents believe that China shares core values such as democracy and the rule of law with India, by far the lowest figure in the survey. Trust in China’s reliability as a partner is also marginal, at around 12 percent. A clear majority of just under 68 percent does not view the country as a reliable partner. Consequently, only a minority of 37 percent views China as a key partner.

Despite political differences, there is a high level of respect for China’s economic achievements. Sixty-three percent believe that China serves as a model from which India can draw lessons for its own development. This makes it clear that the Chinese development model is recognized as a relevant benchmark for India’s own rise, even in the absence of ideological alignment or trusting relations.

**Figure 13 | A Model for Development Despite Deep Mistrust**

Assessment of China as a Partner for India



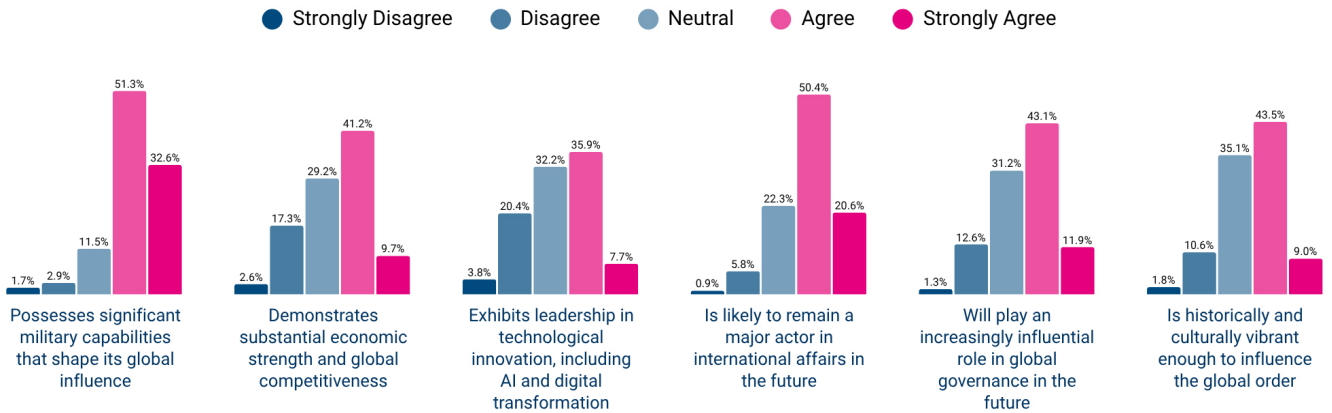
### 5.3. Russia

The capabilities of India’s long-standing strategic partner, Russia, are assessed with significantly more caution compared to the U.S. and China. Respondents have the most confidence in Russia’s military strength, which 84 percent view as pivotal to the country’s international influence. By contrast, only 51 percent of respondents attest to the country’s economic strength. Merely 44 percent view Russia as a technological leader while 53 percent consider the country culturally vibrant enough to exert global influence.

Consequently, only 71 percent of respondents believe Russia will continue to play a significant role in global politics. Only 55 percent believe that Russia, which has become isolated in many parts of the world following its invasion of Ukraine will be able to exert greater influence over international rules.

**Figure 14 | Partner with limited future prospects**

Assessment of Russia's geopolitical influence

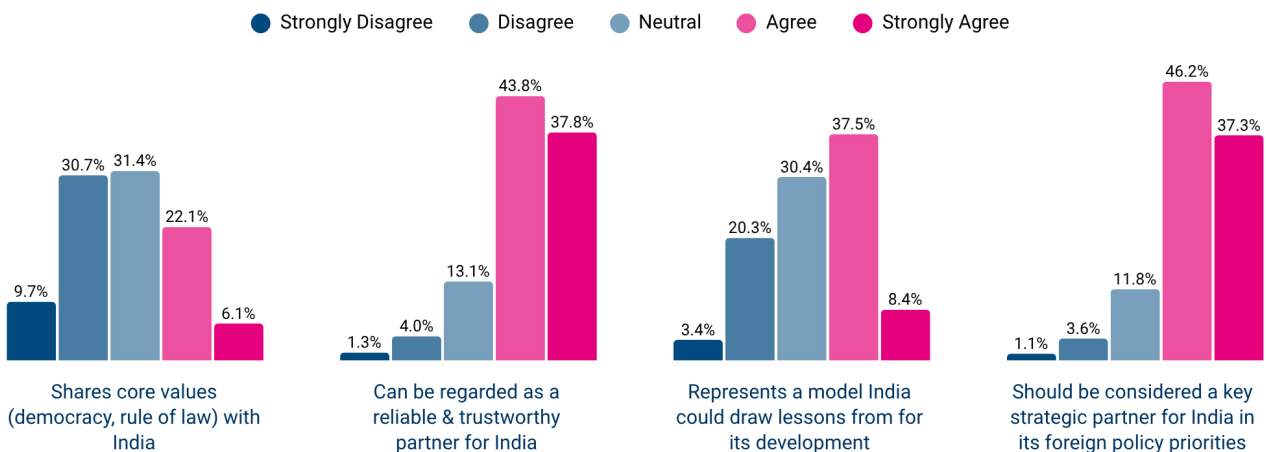


Respondents view the partnership with Russia almost as a mirror image of their assessment of the U.S. While agreement on democratic values and the rule of law is low at 28 percent (40 percent see no common ground with Russia in this regard), the country enjoys by far the highest level of trust. Eighty-two percent consider Russia a reliable and trustworthy partner, a figure far surpassed by India's Western partners.

Accordingly, 84 percent of respondents view the government in Moscow, with which India maintained close ties even during the Soviet era, as a key partner. This is the highest figure in this category. As a model for India's own modernization, however, the country plays a secondary role. Only 46 percent view Russia as a model from which India can draw lessons for its own development. The partnership is thus defined primarily by geopolitical stability and less by an ideological or economic role model function.

**Figure 15 | Trust, but no shared values**

Assessment of Russia as a Partner for India

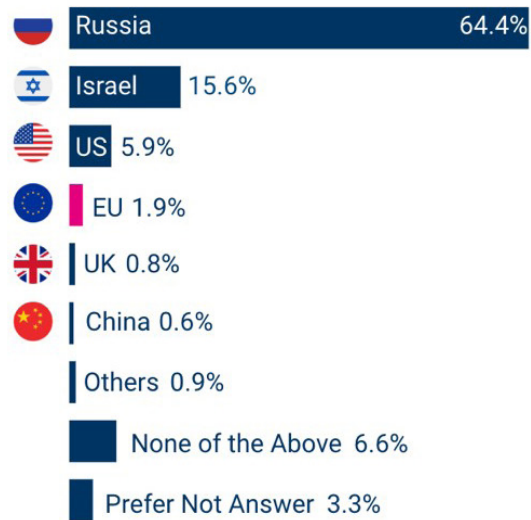


This high level of trust in Russia as a partner is also reflected in view of the military threat scenarios. Sixty-four percent of respondents are convinced that the government in Moscow would provide military support in the event of an armed conflict. This deep trust in the traditional partner stands in sharp contrast

to the skepticism toward the West. Neither the U.S. (six percent) nor the EU (two percent) are perceived as relevant security guarantors. Only Israel, as a potential supporter, still enjoys a certain degree of respect at 16 percent, but remains far behind Russia in terms of importance.

**Figure 16 | High Expectations for Military Support**

Question: Which country or region would most likely provide military support to India in the event of an armed conflict?

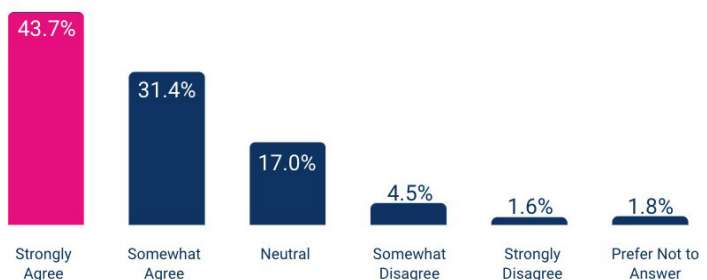


Criticism from Europe and the U.S. regarding India’s oil deals with Russia, which have increased significantly since Russia’s invasion of Ukraine, has met with virtually no response in India.

A good 75 percent consider it acceptable for India to continue purchasing Russian oil and not participate in Western sanctions. Critical voices on this issue are virtually nonexistent. Only a minority of about six percent opposes India’s current course.

**Figure 17 | Large majority supports energy deals with Russia**

Question: Is it acceptable for India to buy Russian oil and not participate in Western sanctions against Russia?



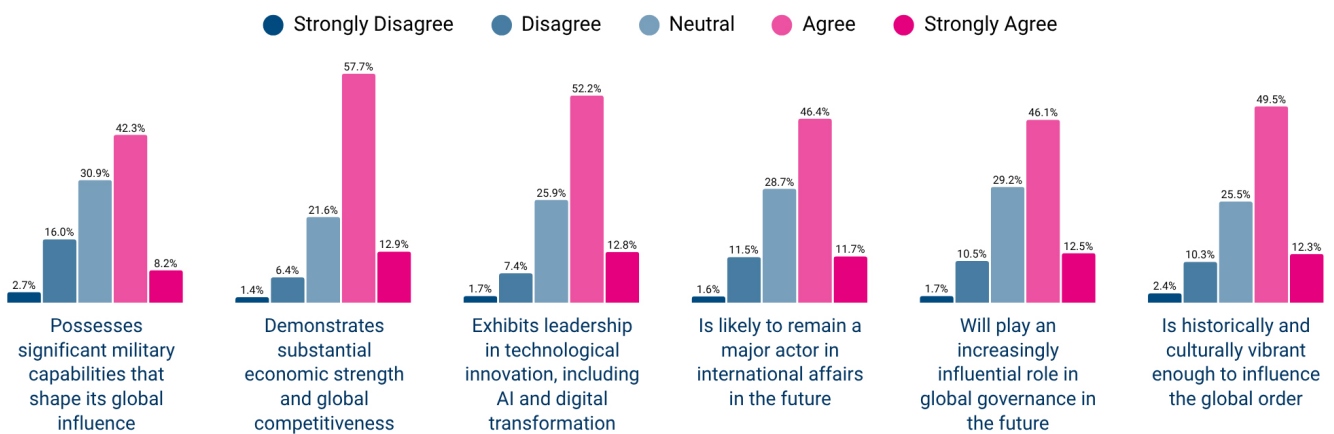
## 5.4. European Union

In India, the European Union is primarily perceived as an economic power, while its security profile is significantly less prominent. Only 51 percent of respondents attribute significant military capabilities to the EU that shape its global influence, the lowest figure among the major powers surveyed. In contrast, 71 percent attest to the EU's economic strength and competitiveness. In the area of technological leadership as well, the EU is perceived as a relevant actor with 65 percent approval, though it lags significantly behind the top figures for the U.S. and China. The EU's "soft power" is comparatively strong: 62 percent view it from a cultural perspective as an influential force. Europe scores similarly well here as the U.S.

Expectations regarding the EU's future role are mixed: only 58 percent believe that the Union will remain a significant player in international affairs. This places Europe not only well behind the U.S. and China, but also below Russia's rating. However, confidence in the EU as a shaping force in global governance is slightly higher at 59 percent. This suggests that people tend to see the EU as playing a growing role in setting global rules rather than exercising traditional power-political dominance.

**Figure 18 | Economic Power, Military Weakness**

Assessment of the European Union's Geopolitical Influence

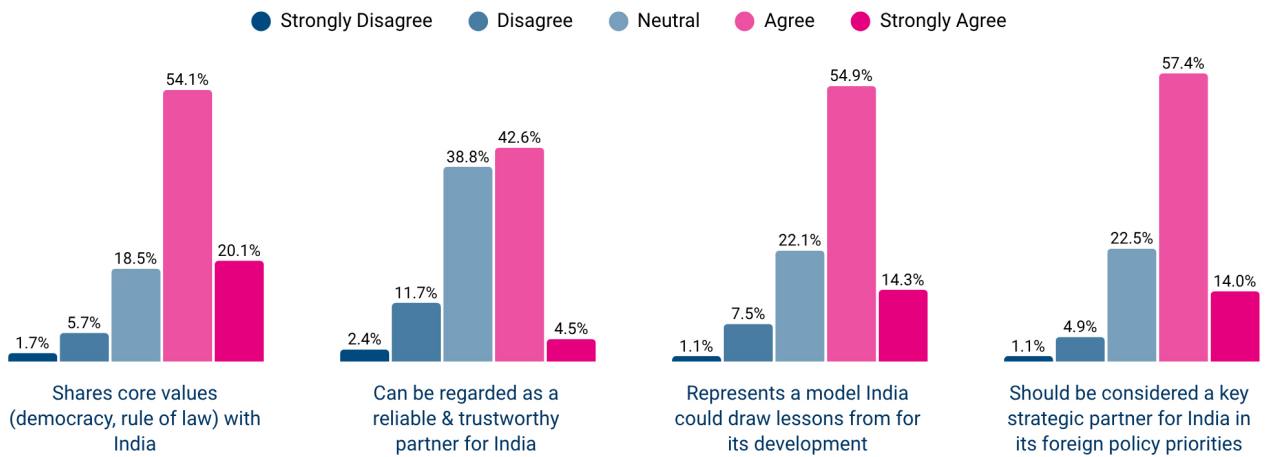


According to the respondents, the European Union achieves the highest level of ideological alignment among the actors surveyed. Seventy-four percent view it as a community that shares India’s core values of democracy and the rule of law, a figure that is even higher than that of the United States. This gives the EU high strategic relevance for India. Seventy-one percent view it as a key partner and 69 percent see it as a model for their own development.

When it comes to trust, however, the picture is more nuanced. While 47 percent view the EU as a reliable partner—placing it well ahead of the U.S. and China—it still lags far behind Russia’s top ranking. The high proportion of undecided respondents is striking. Thirty-nine percent take a neutral stance. This suggests that while the EU is viewed in India as a benevolent and important partner, a deep-rooted historical foundation of trust, such as that which exists with Russia, does not yet appear to be fully established.

**Figure 19 | Partner of shared values with potential for growth**

Assessment of the European Union as a partner for India

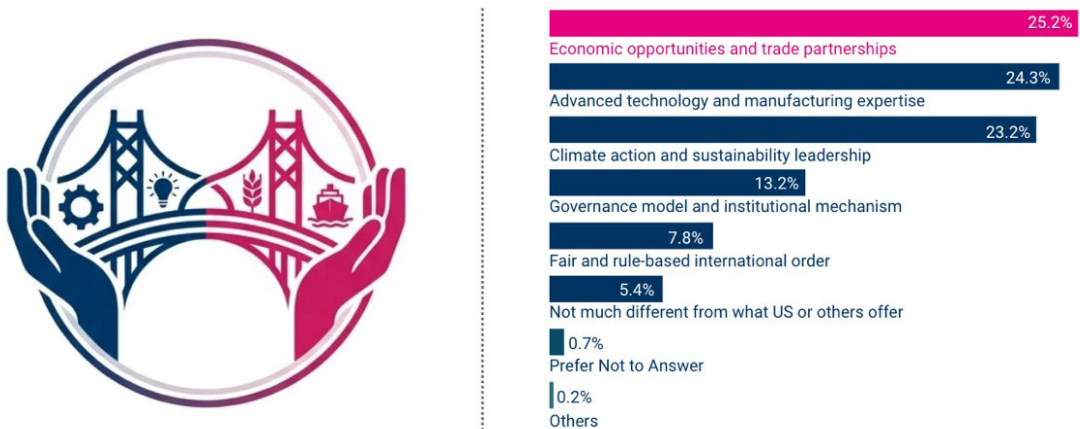


When it comes to the question of which areas of cooperation allow the EU to distinguish itself from other major powers, economic factors take center stage. Twenty-five percent consider the economic opportunities and trade partnerships with Europe to be particularly promising. Twenty-four percent point to Europe’s advanced technology and manufacturing expertise. Twenty-three percent see potential for cooperation in climate protection and sustainability issues.

This result illustrates that the EU is primarily viewed in India as a pragmatic partner for modernization. Political aspects, by contrast, are less frequently seen as an exclusive advantage of the relationship with the EU: the governance model (13 percent) and the commitment to a fair, rules-based order (eight percent) rank well behind material and environmental offerings.

**Figure 20 | Sought after as a pragmatic modernization partner**

Question: What can Europe offer India that other powers cannot?

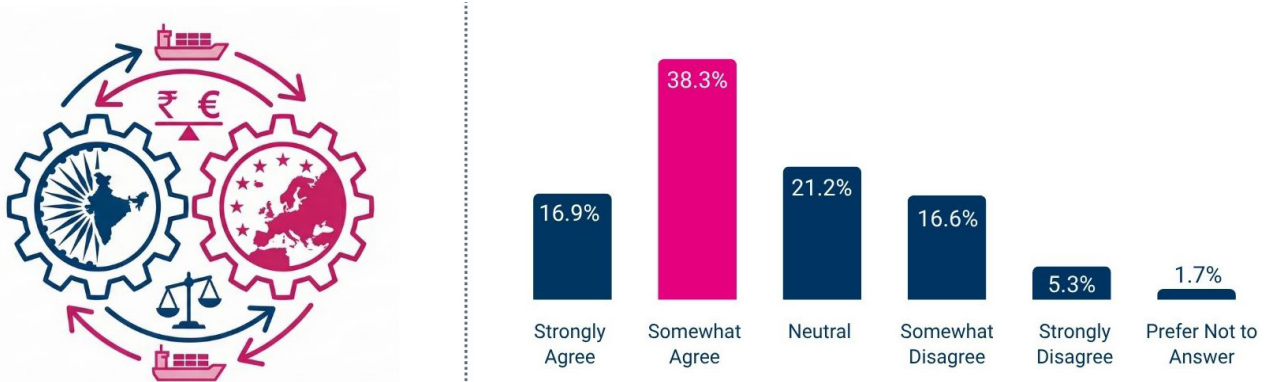


The European Union’s appeal as an economic powerhouse is so great that a majority of Indians would even be willing to lower protectionist barriers for it. Fifty-five percent of those surveyed support a deepening of

trade relations, even if this requires expanded access for the EU to the Indian market in return. Opposition to this step is comparatively low, at 22 percent overall.

**Figure 21 | High willingness to open markets to Europe**

Statement: Trade relations between India and the EU should be deepened, even if this requires greater access to the Indian market.

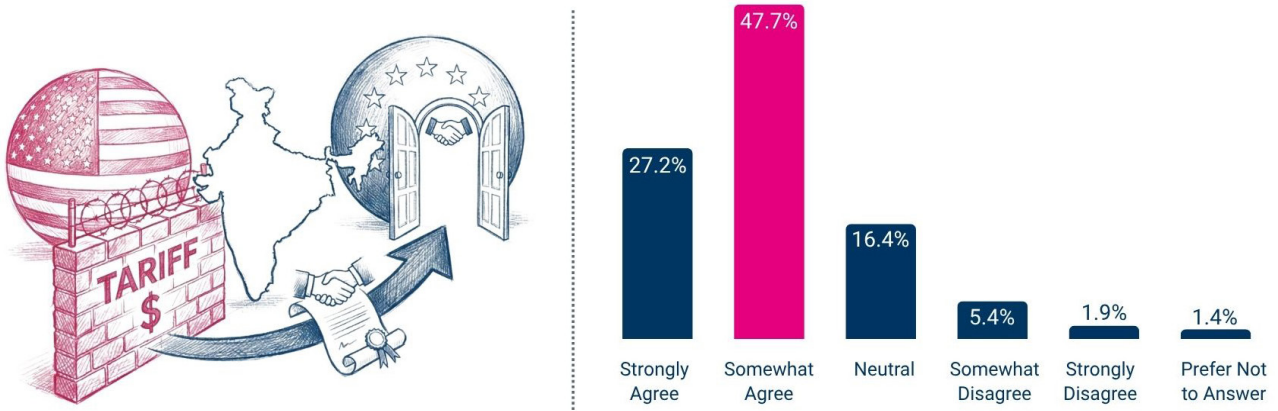


The strategic importance of deeper trade relations with Europe becomes particularly clear in the context of global trade tensions. Three-quarters of respondents (75 percent) view a free trade agreement with the EU as

the right response to high U.S. tariffs. Thus, in the Indian perception, it serves as an essential counterweight to protect against protectionist pressure from the U.S.

**Figure 22 | Europe as a counterweight to the US**

Statement: A free trade agreement with the EU would be the right strategic response to high U.S. tariffs.



5.5. Germany

A further deepening of the strategic partnership with Germany is viewed overwhelmingly positively in India. Around 87 percent advocate for closer ties. Respondents would like to see Germany adopt a geopolitically independent stance. Just under 78 percent call on the government in Berlin to pursue greater foreign policy independence from the United States. From India’s perspective, the pursuit of a permanent seat on the United Nations Security Council is a particularly high priority in its cooperation with Germany: 87 percent would like to see support from Berlin in this regard.

While Germany is in demand as a political actor, interest in military rearmament within the Federal Republic remains muted. Around 78 percent want Germany to play a more active role globally in solving world problems such as climate change.

Yet, the military “turning point” finds little resonance in India: the question of whether Germany should increase its defense spending divides respondents. While a good 51 percent agree, the proportion of those who take a neutral stance on this issue, at over 35 percent, is unusually high. This suggests that Germany is perceived in India primarily as a civilian power and an ideological force, but less so as a military actor.

Respondents also have high expectations of Germany when it comes to cooperation in education and skilled labor. Over 87 percent call for openness toward Indian skilled workers and students, for example through simplified visa requirements. At the same time, respondents also expect technological excellence from their partner. Nearly 78 percent urge Germany to improve its digital technology, particularly in the field of artificial intelligence.

**Figure 23 | Strong Support for Closer Cooperation**

India's expectations regarding the relationship with Germany

Germany should become a closer strategic partner to India

★★★★★ | 86.8%

Germany should play a more active role globally in solving world issues, such as sustainability and climate change

★★★★★ | 78.1%

Germany should increase its spending for defense/military capacity

★★★★★ | 51.6%

Germany should support India's bid for a permanent seat in the United Nations Security Council (UNSC)

★★★★★ | 87.4%



Germany should become more independent from the US in its foreign policy

77.9% | ★★★★★

Germany should be open for Indian workers and students (through easier visas/migration)

87.4% | ★★★★★

Germany should improve its digital technology, especially in Artificial Intelligence (AI)

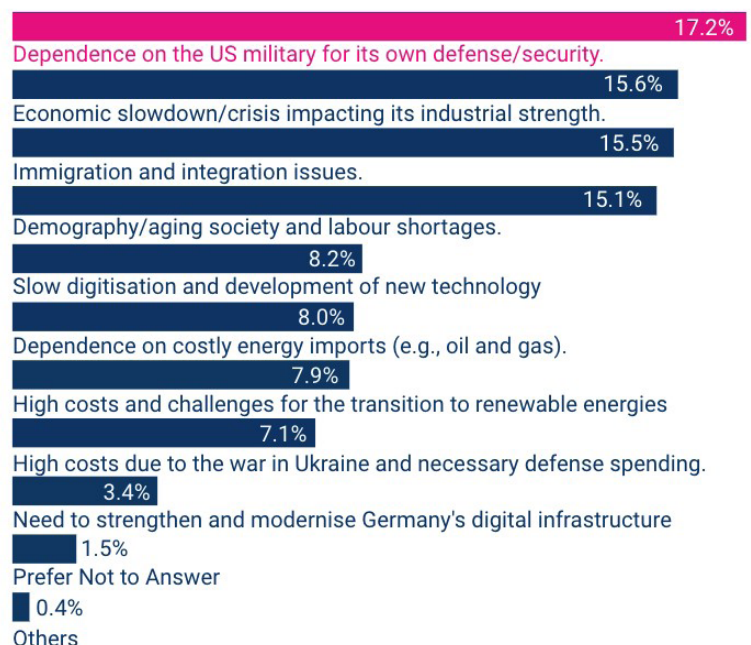
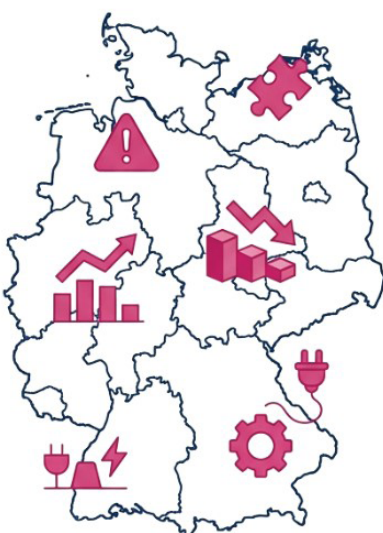
78.3% | ★★★★★

When asked about Germany's greatest challenges, a range of concerns emerged, each weighted almost equally. At the top, with 17 percent, is military dependence on the U.S. Close behind are three fundamental domestic policy issues: the current economic crisis (16 percent), problems relating to migration and

integration (16 percent) and demographic change (15 percent). Technical and energy policy challenges, such as the slow pace of digitalization and the costs of the energy transition (eight percent each), are considered less serious.

**Figure 24 | Concerns about dependence and internal stability**

Question: In your opinion, what are the greatest challenges facing Germany today?



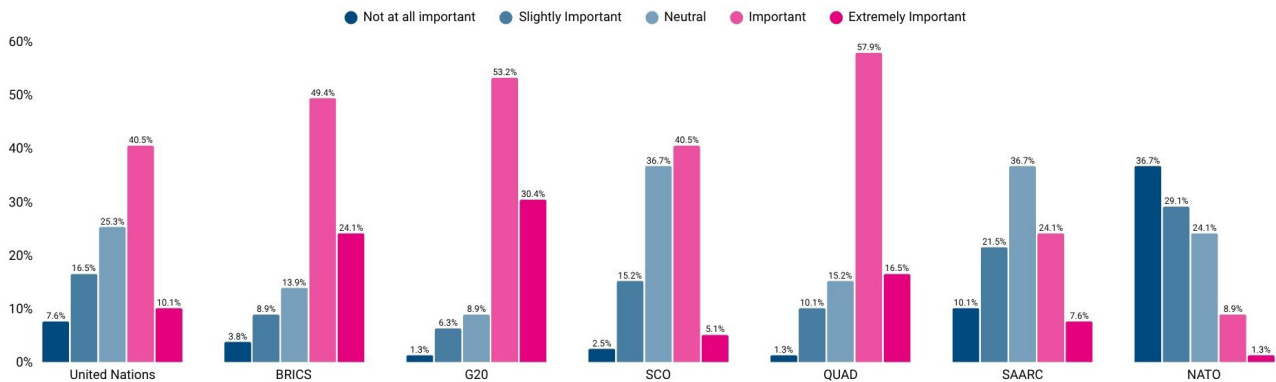
## 5.6. International organizations

When it comes to evaluating international organizations, there is a clear preference for formats in which India plays a leading role or that allow it strategic autonomy. The undisputed frontrunner is the G20: 84 percent of respondents consider this forum to be of high or extremely high importance, possibly a lingering effect of India’s successful G20 presidency in 2023. But the policy of strategic balance is also welcomed: the Western-oriented Quad security framework and the BRICS group, which includes China and Russia, are nearly tied with approval ratings of around 73 to 74 percent. This underscores that the Indian public supports the foreign policy strategy of multi-alignment, that is, simultaneous ties to different geopolitical camps, is supported.

Organizations in which India itself plays a less prominent role are also rated as less important by respondents. Just under 51 percent consider the United Nations to be important or very important. The Shanghai Cooperation Organization (SCO), which is considered to be dominated by China, is viewed as important or very important by 46 percent. The regional organization SAARC is rated as important or very important by only 32 percent. The figure is even lower for the purely Western military alliance NATO, at just 10 percent.

**Figure 25 | Priority for New Centers of Power**

Assessment of the importance of international organizations



The established pillars of the world order are facing a deep crisis of credibility. Leading the way is the United Nations: nearly two-thirds of respondents (64 percent) perceive that the UN's effectiveness has declined in recent years. The World Trade Organization (WTO) is also struggling with a loss of reputation. Nearly half (47 percent) see a negative trend there. The major financial institutions appear somewhat more stable, though they are perceived as stagnant rather than dynamic: For the IMF (42 percent) and the World Bank (49 percent), the prevailing view is that their performance has remained unchanged.

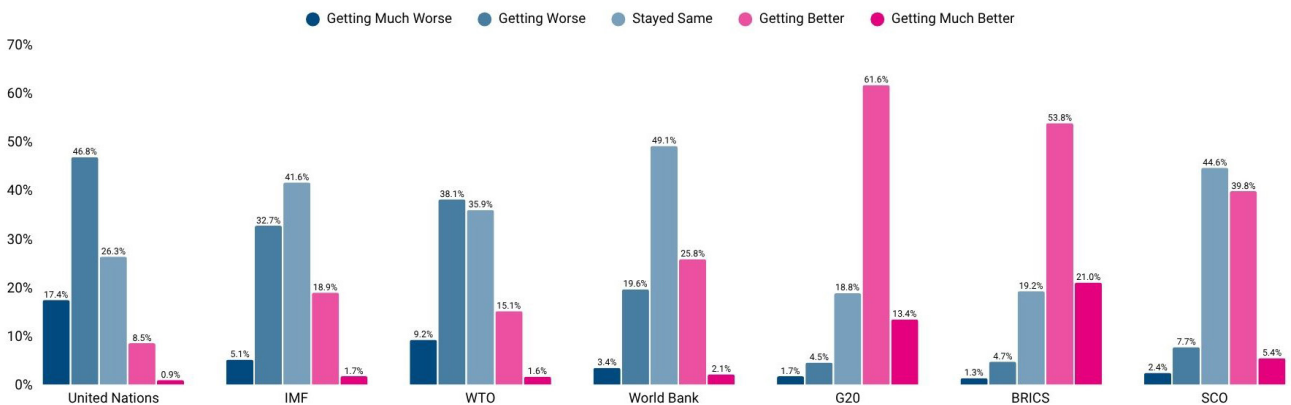
This stands in sharp contrast to the optimism surrounding the new, multipolar platforms.

The G20 is perceived as the big winner: three-quarters of respondents (75 percent) believe the forum has become more effective. The outlook for the BRICS group is similarly optimistic, with just under 75 percent seeing positive developments. The SCO also receives a favorable rating from a portion of respondents.

Forty-five percent attest to an improvement, although an equally large group of around 45 percent of respondents see the organization as having largely stagnated. The overall result highlights a massive shift in the trust away from Western-dominated institutions toward forums in which the Global South is more strongly represented.

**Figure 26 | Decline of the Old Order**

Question: How effective have the following international organizations been in the recent past?

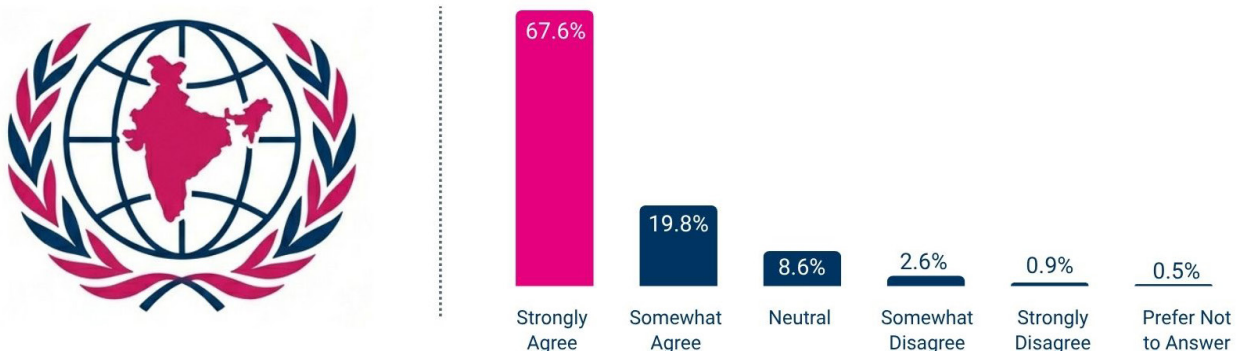


Criticism of the United Nations' effectiveness corresponds with the demand for greater participation. Eighty-seven percent of

respondents call for a permanent seat for India on the UN Security Council.

**Figure 27 | Calls for UN reform**

Statement: India should have a permanent seat at the United Nations Security Council.



## 6. India's Challenges

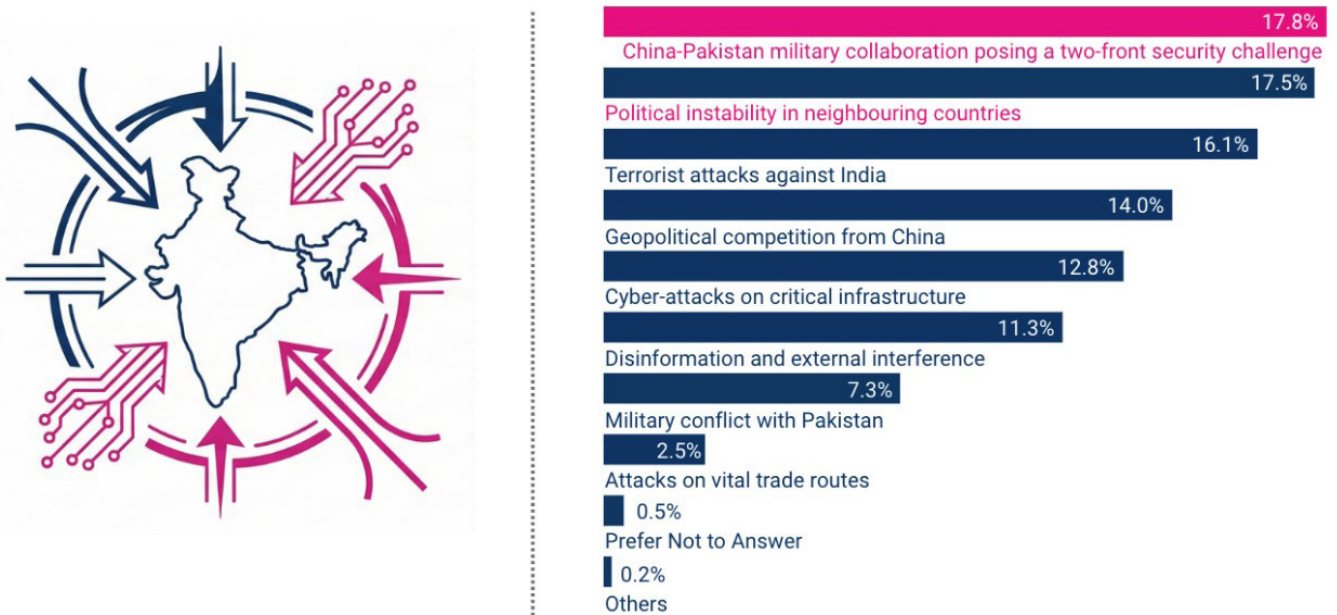
### 6.1. Security

India's perception of threats is dominated primarily by concerns about strategic encirclement and regional chaos. At 18 percent, military cooperation between China and Pakistan, and the associated "two-front challenge", is perceived as the greatest threat, yet it is almost on par with fears of political instability in neighboring countries such as

Myanmar, where a civil war is currently raging (also just under 18 percent). While terrorist attacks (16 percent) continue to be viewed as a high risk, an isolated military conflict with Pakistan (seven percent) is considered significantly less threatening than geopolitical competition from China (14 percent).

**Figure 28 | Concerns about encirclement and regional instability**

Question: In your opinion, what is the greatest threat to India's security?

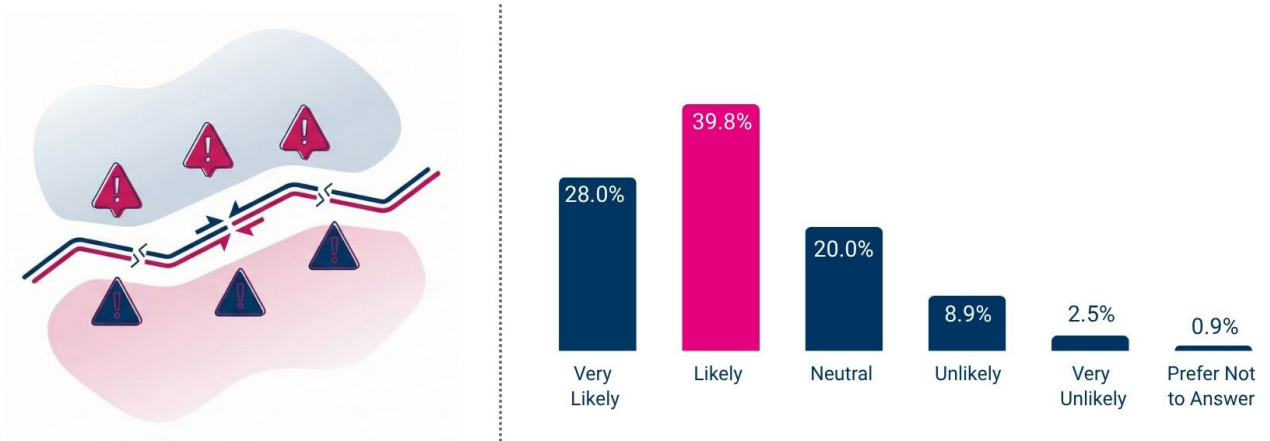


A clear majority of respondents expect the unresolved border disputes between India and its neighbors to escalate militarily in the future. Overall, 68 percent consider this likely or even

very likely (likely 40 percent and very likely 28 percent). In contrast, only a small minority of just over 11 percent considers the risk of an armed conflict to be low.

**Figure 29 | Dangerous border conflicts**

Statement: Unresolved border issues between India and its neighbors will lead to military conflicts in the future



India and Pakistan have viewed each other as rivals for decades. In 2025, heavy military fighting broke out after India struck targets in Pakistan. In India, just under half (48 percent)

expect a full-scale military conflict within the next 10 years. Around 28 percent consider this scenario unlikely.

**Figure 30 | High risk of conflict with Pakistan**

Question: How likely is a full-scale military conflict between India and Pakistan in the next 10 years?

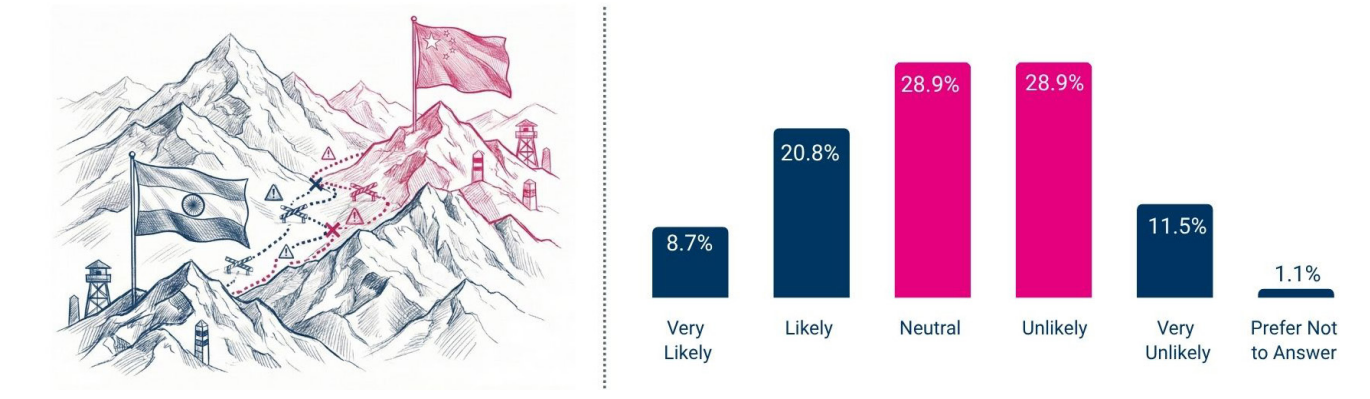


In contrast to the feared escalation with Pakistan, a war with China is considered significantly less likely in the next 10 years. Forty percent of respondents consider a full-

scale military conflict unlikely or very unlikely. In contrast, 30 percent describe the scenario as likely or very likely.

**Figure 31 | Majority does not expect a full-scale military conflict with China**

Question: How likely is a full-scale military conflict between India and China in the next 10 years?

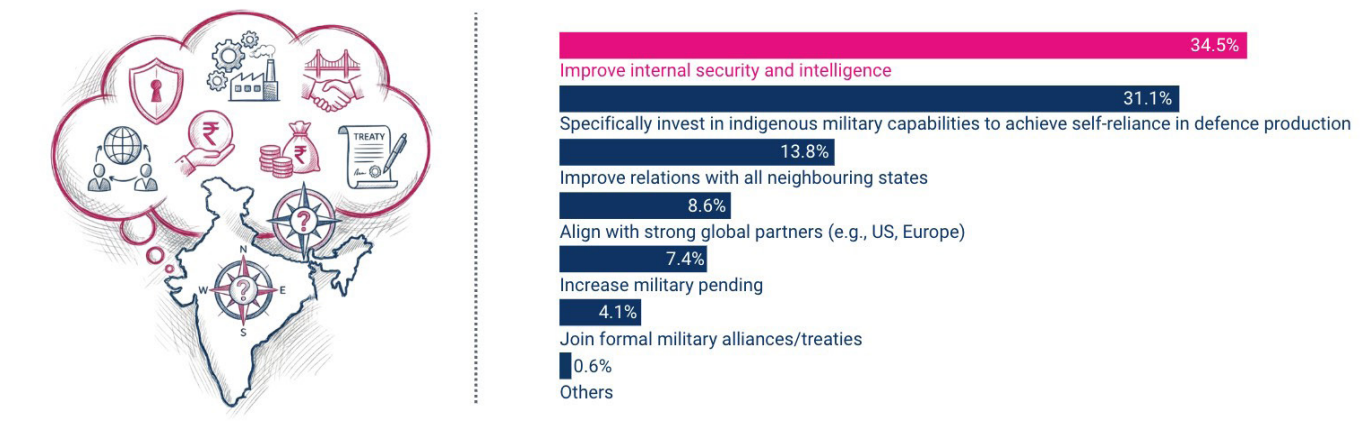


To address future security risks, India favors self-reliance over cooperation with external alliances. The majority of respondents prioritize national measures: 35 percent view improving internal security and intelligence services as the most urgent task, closely followed by 31 percent who call for investments in the domestic defense industry and military self-

sufficiency. This clear preference for self-reliance stands in stark contrast to the low desire for international ties: 14 percent view improving relations with neighboring countries as a priority, while nine percent prioritize ties with partners such as the U.S. and Europe. Only four percent consider joining formal military alliances to be the most important task.

**Figure 32 | Focus on Strategic Autonomy**

Question: What should India prioritize most to address security risks?

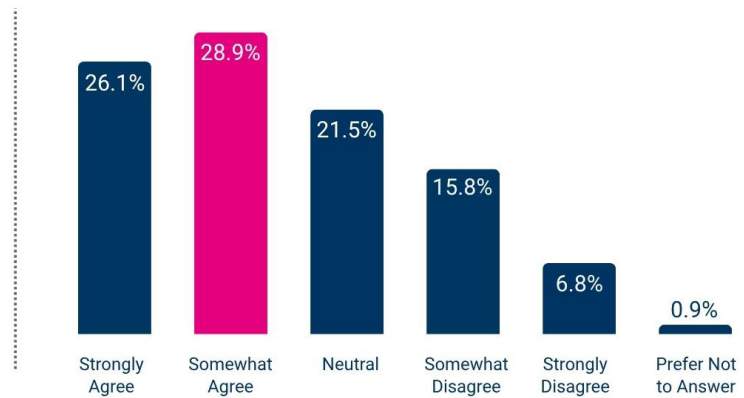
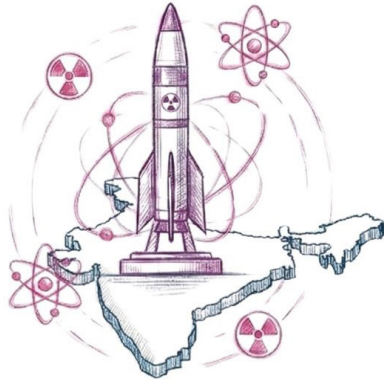


When asked specifically about India’s nuclear military capabilities, a clear majority supports further expansion. A majority of 55 percent

wants to strengthen India’s position as a nuclear power. Only 23 percent oppose expanding the arsenal.

**Figure 33 | Majority supports nuclear deterrence**

Statement: India should expand its nuclear military capabilities.

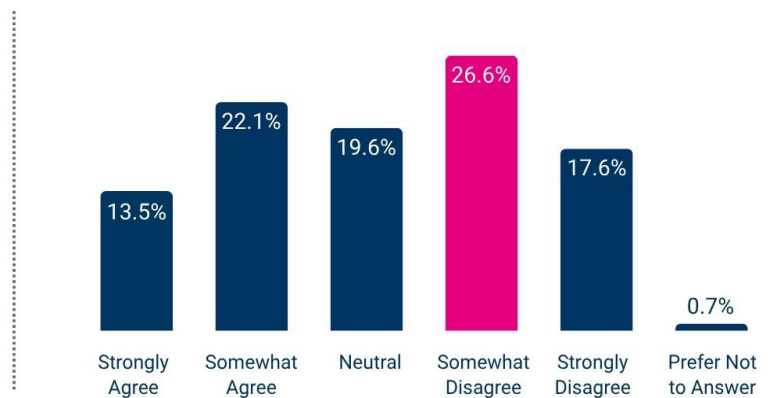
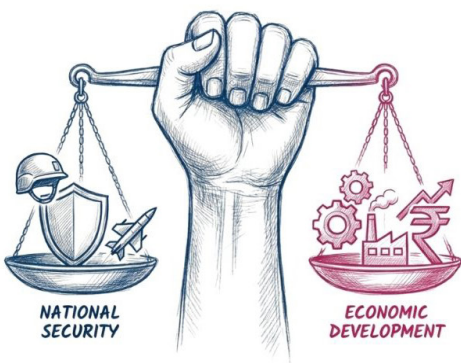


Despite a strong desire for military independence, a large majority of respondents oppose military buildup if it comes at the expense of economic progress. Forty-four

percent oppose higher defense spending in this case. Only about 36 percent would be willing to accept economic losses in exchange for greater security.

**Figure 34 | Majority Opposed to Military Build-Up at the Expense of Prosperity**

Statement: India must invest more in its defense forces to ensure national security—even at the expense of economic development.



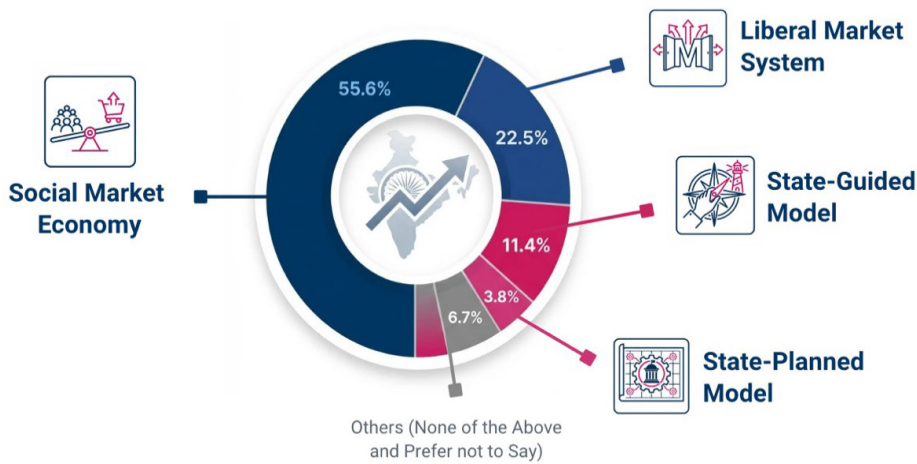
## 6.2. Economy

When asked about the ideal economic system, respondents rejected both unbridled capitalism and a planned economy: With 56 percent, an absolute majority favors the model of the social market economy as the best path

forward for the country. The liberal market system with minimal government intervention comes in second place with 23 percent. State-directed (11 percent) or planned models (4 percent) find little support in public opinion.

**Figure 35 | Clear Preference for the Social Market Economy**

Question: Which economic model best suits India in your view?



India’s young population is considered one of the key drivers of future growth. Fifty-five percent view the associated large labor pool as by far the greatest advantage for the country’s continued economic development.

Other frequently cited strengths of the country lag far behind in the lower ranks: 13 percent view the IT and software sector as a dominant factor, while the thriving startup ecosystem is cited by 10 percent of respondents.

**Figure 36 | Demographics as a Growth Engine**

Question: What is India’s greatest advantage for future economic growth?

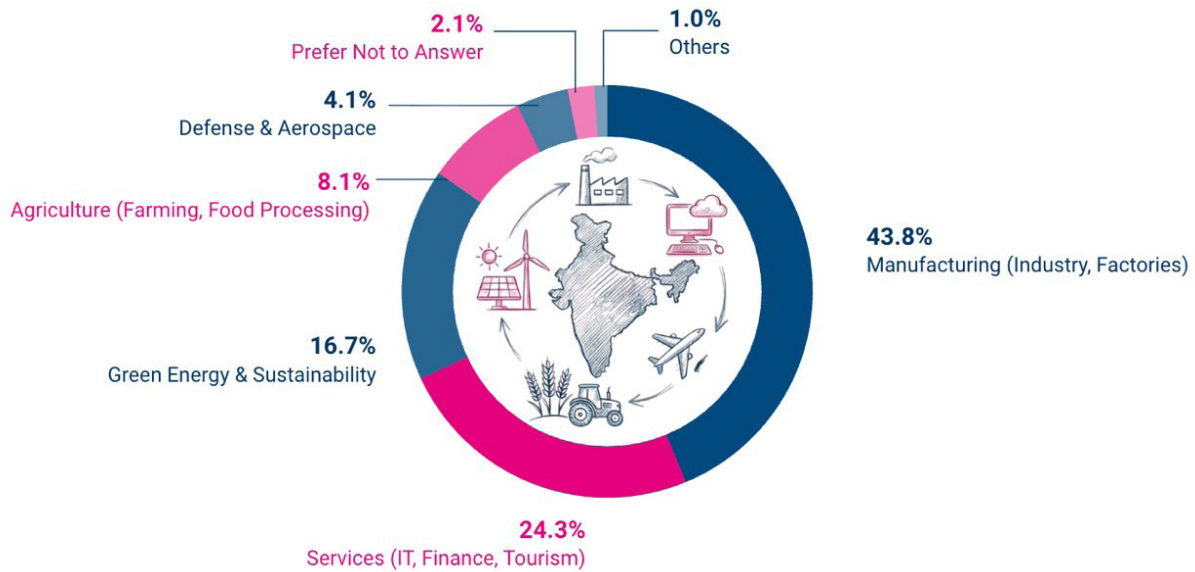


The manufacturing sector is considered the key driver of further growth in India. Forty-four percent advocate focusing on this sector, which the government is seeking to strengthen through initiatives such as "Make in India." Twenty-four percent see the greatest potential

in the service sector, while 17 percent advocate prioritizing green technologies and sustainability. Agriculture, which still employs a large portion of the population, is cited as a focus sector by only eight percent.

**Figure 37 | Call for Further Industrialization**

Question: Which sector should India focus on for future economic growth?

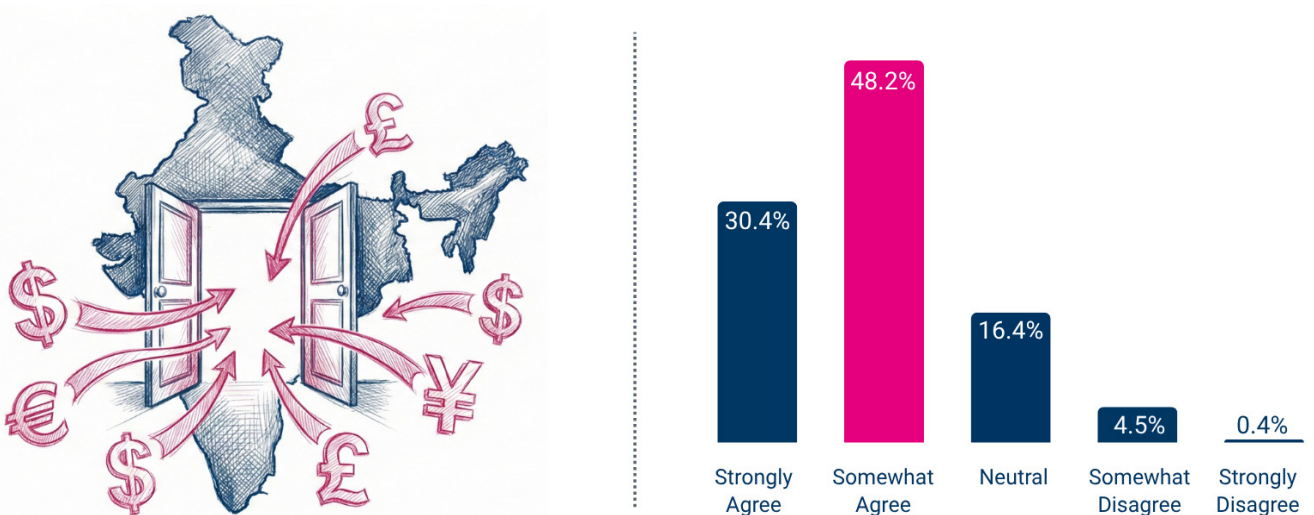


A large majority of respondents support deeper integration of India into the global economy. Seventy-nine percent of respondents are in favor of further opening the Indian market to

international investment and trade. Opposition to foreign capital is low, at less than five percent.

**Figure 38 | Support for economic openness**

Statement: India should further open its market to international investment and trade.

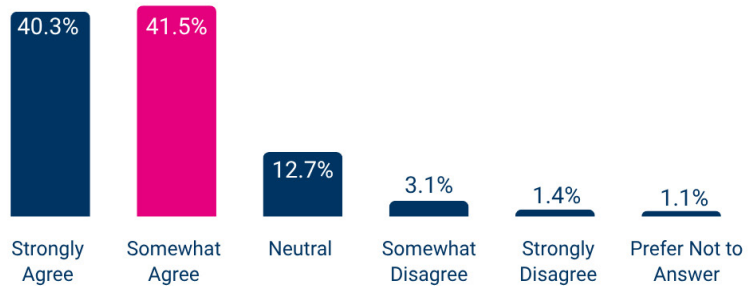


There is strong support for India’s integration into regional free-trade zones. Nearly 82 percent favor India becoming more involved in regional trade partnerships such as the RCEP

or the CPTPP. Opposition to such multilateral agreements is very low, at less than five percent.

**Figure 39 | Strong interest in free trade zones**

Statement: India should become more involved in regional trade partnerships such as the CPTPP, RCEP, or similar agreements.

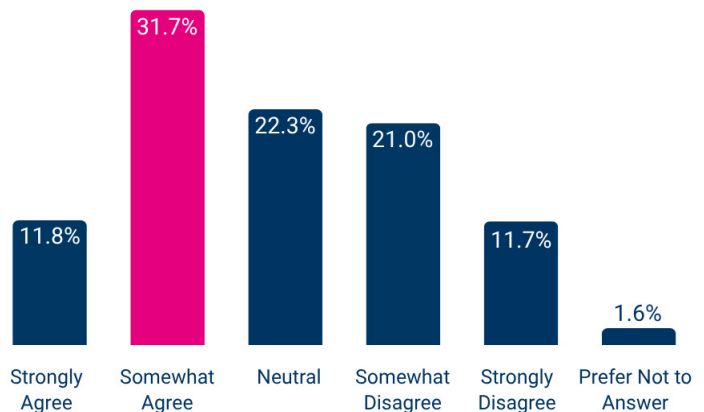
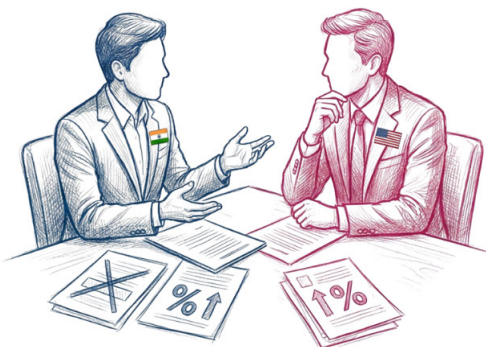


When it comes to finding a way out of the trade dispute with the U.S., respondents are divided. A relative majority of 44 percent believes that India should make compromises to avoid punitive tariffs. But this pragmatism has its

limits: only 12 percent “strongly agree” with this, while 32 percent are at least somewhat in favor. A total of 33 percent is either somewhat or completely opposed to making concessions.

**Figure 40 | Limited willingness to make concessions to the U.S.**

Statement: India should be willing to make trade compromises to reverse high U.S. tariffs on Indian goods.

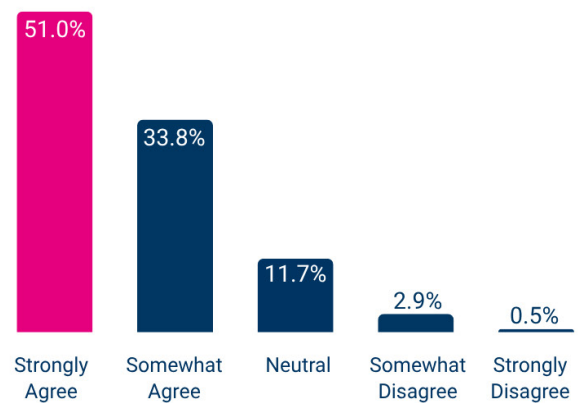


A large majority wants to make India less dependent on the U.S. financial system. Eighty-five percent call for India to conduct more international trade in its own currency in order to strengthen the rupee's global role. This

goes hand in hand with a desire for active “de-dollarization”: About 69 percent of respondents support measures to reduce dependence on the U.S. dollar.

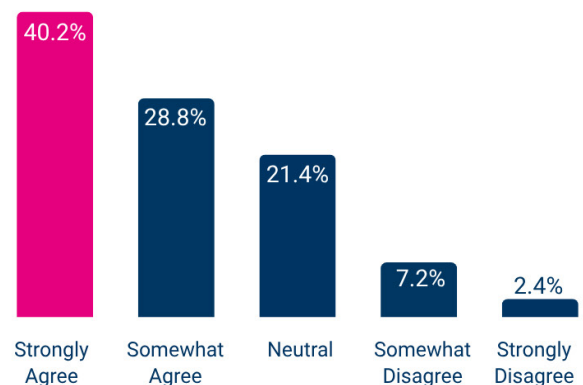
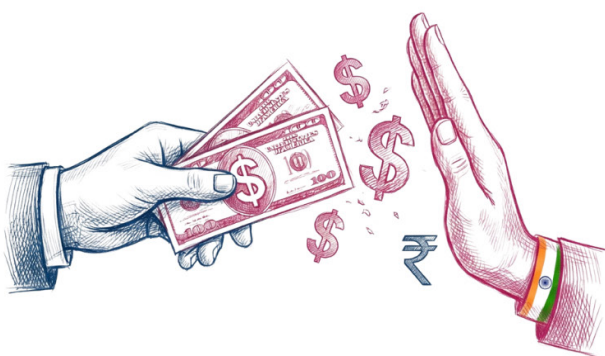
**Figure 41 | India's currency strategy**

Statement: India should expand international trade settlements in the Indian Rupee (INR) in order to strengthen the global role of its currency.



**Figure 42 | India and De-Dollarization**

Statement: India should actively promote de-dollarization, i.e., reduce dependence on the U.S. dollar in global trade and finance.

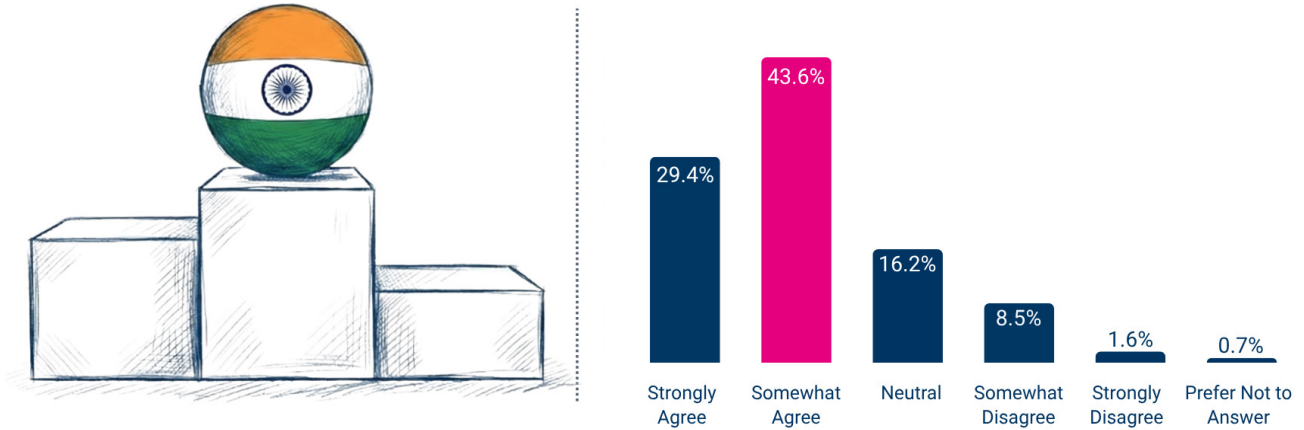


In India, there is a high level of confidence in the country's ability to prevail against established manufacturing hubs. Seventy-three percent are convinced that, over the next 10 years, India will replace countries such as China or Vietnam as the preferred destination for

foreign manufacturing investment. Skepticism regarding this ambitious goal is minimal: only 10 percent of respondents doubt that the country can realize this claim to global leadership in the manufacturing industry.

**Figure 43 | Optimism in Global Competition**

Statement: India will become a preferred global destination for foreign investment in the manufacturing sector over the next 10 years (compared to countries such as China or Vietnam).

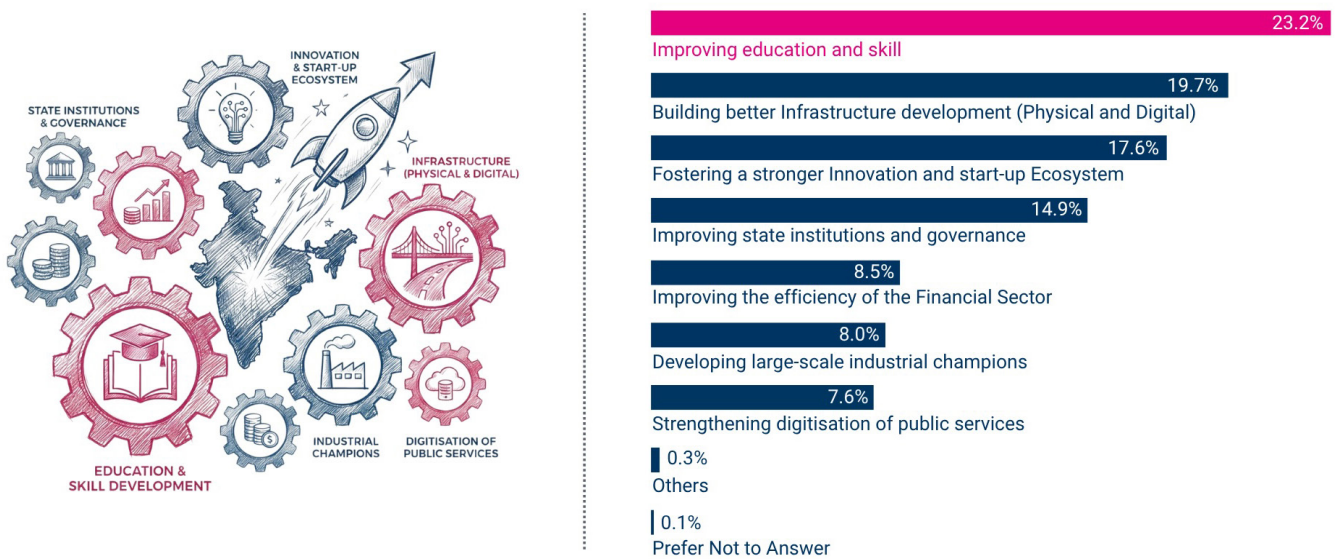


Most respondents view improving education as a key factor in boosting India’s competitiveness, with 23 percent citing this point. This is closely followed by calls for better infrastructure (20 percent), as well as fostering

a strong innovation and startup ecosystem (18 percent). Improvements to government institutions are considered crucial to India’s competitiveness by 15 percent.

**Figure 44 | Education as the Foundation of Competitiveness**

Question: What is most important for improving India’s global competitiveness?



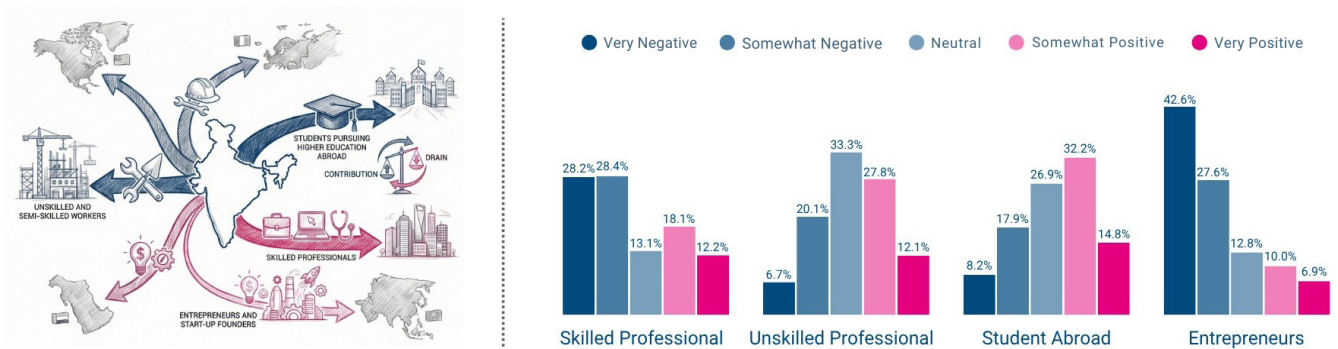
### 6.3. Migration

The Indian public views migration very differently depending on which segment of the population is leaving the country. While the majority views young Indians studying abroad as an opportunity—nearly 47 percent see this positively—there is widespread alarm regarding the permanent departure of high-achieving individuals. The exodus of entrepreneurs and startup founders is viewed

with particular alarm: over 70 percent of respondents consider this harmful to national interests. The loss of skilled professionals, such as engineers or IT specialists, is also viewed negatively by a majority of just under 57 percent. The migration of unskilled workers, on the other hand, meets with a neutral to positive response.

**Figure 45 | Concerns about the "brain drain"**

Assessment of emigration among various population groups

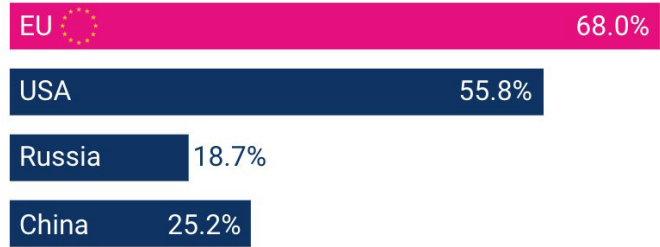


While Russia is viewed as a close partner politically and militarily, the country plays hardly any role as a destination for living. When it comes to education and careers, India looks almost exclusively to the West, with a clear preference for Europe. The European Union is the most sought-after destination: around 68 percent of respondents would move to the

EU for studies, and nearly 67 percent for a job. This puts Europe ahead of the U.S., which is also very popular—56 percent for education, 51 percent for jobs—but does not take the top spot. China and Russia, on the other hand, are largely unattractive as migration destinations. The majority reject moving there or are skeptical about it.

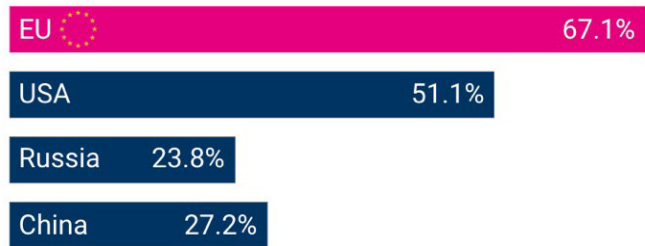
**Figure 46 | Educational Destination**

Question: Do you think that country X (the European Union/ the United States/ China/ Russia) offers attractive educational opportunities for your children and dependents?



**Figure 47 | Career Opportunities**

Question: Do you think that country X (the European Union/ the United States/ China/ Russia) is an attractive destination you would seriously consider relocating to for work?



## 7. Conclusions and Recommendations

The available data paint a picture of a self-assured India that aims to play a decisive role in shaping a new world order. With a firm belief in its own rise to become a world power and a widespread call for a leadership role in the Global South, the country is calling for cooperation on an equal footing. In doing so, India is seeking partners willing to support its development into a prosperous industrial nation. The European Union has a good chance of positioning itself as a key partner but it must keep certain crucial points in mind:

- Understanding India's strategic constraints:** India's concern about being encircled by China is geopolitically understandable. India views its long-standing partnership with Russia as an indispensable safeguard in this regard. Europe would do well to understand this perspective and, in light of a possible distancing from Russia, not to place unrealistic expectations on the government in New Delhi. In return, however, India must also respect the European perspective: a clear condemnation of the war of aggression against Ukraine is essential for Europe. A partnership on equal footing must be able to withstand this disagreement.
- Emphasize common ground:** India and Europe are united by values such as democracy and the rule of law. The model of the social market economy practiced in Europe is also held in high regard in India. In terms of economic policy, the EU is seen as a role model. European educational programs also enjoy an excellent reputation. To distinguish itself from geopolitical competitors, the EU should build on these strengths as it expands its relationship with India.
- Focusing on the economy:** India's primary interest is in further economic growth—in part to address labor market challenges and reduce poverty in the country. Accordingly, the value of a partner is measured by how much it helps the country achieve these goals. Germany and the EU should therefore consistently bundle their offerings under the narrative of a modernization partnership. Those who supply India with technology and bring investment will also gain political influence.
- The momentum to a free trade agreement:** India sees a free trade agreement with the EU as a major opportunity. Against the backdrop of the trade dispute with the U.S., Europe is viewed as a promising alternative, which is why the country is prepared to make far-reaching concessions on market opening. This historic moment should be seized to swiftly conclude and ratify the agreement.
- Provide technology:** India has a lot of catching up to do in the areas of environment and energy, while Europe possesses the necessary green technologies. This presents an opportunity for a modernization partnership that combines climate protection and growth. However, India must not be viewed merely as a sales market. The country aims to strengthen its own industry, in part to create much-needed jobs. This calls for investments in local production.
- Shaping migration as a win-win model:** India has the young skilled workers that Europe urgently needs. The potential for cooperation is vast: the EU is an extremely

popular destination. In India, however, there are fears of a “brain drain” of the best minds. To allay these concerns, models of circular migration should be promoted, in which skilled workers return to India with expertise and capital after spending time in Europe.

- **Building trust:** India values long-term partnerships as evidenced by its resilient ties to Russia. Conversely, the country reacts sensitively when trust is abused, as currently seen in its cooled relations with the U.S., whose policies are perceived as unpredictable. Europe should learn from this and position itself as the stable, reliable partner.
- **Doing the homework:** To realize the full potential of a partnership with India, Europe must become stronger. The survey reveals bluntly: the Indian elite considers Europe militarily weak and economically views it as far behind the United States and China in terms of technology. The EU must become more effective in these areas. Only a strong and competitive Europe can be an attractive partner for the Global South.

The foundation for a closer relationship between India and Europe has been laid. India looks to Europe with hope, especially with a view to deepening economic cooperation. Europe must, however, be clear that the world’s largest democracy is not a natural ally in the Western sense, but rather a representative of its own interests. If Europe accepts this and makes concrete offers to support India’s rise, an influential partnership of mutual benefit could emerge, providing both sides with strategic advantages in a new world order.

## GENERAL DISCLAIMER

This publication is the result of an independent research collaboration between the Friedrich Naumann Foundation for Freedom (FNF), the Kalinga Kusum Foundation (KKF), and Rajneethi Management Consultancy. All findings, interpretations, opinions, and conclusions expressed herein are solely those of the study's author(s) based on the opinions shared by survey respondents. They do not represent the official views, policy positions, or endorsements of FNF, KKF, Rajneethi, the Government of India, any ministry or institution, or any political party or elected representative. The collaborating organizations acted exclusively as facilitators of research and dialogue. None of them shall be held responsible for any misinterpretation, selective citation, misrepresentation, or misuse of the report, its data, or its analysis by third parties. Any quotation, reproduction, or reference to this document must acknowledge its independent, non-partisan, and non-prescriptive nature. The publication must not be used for political campaigning, advocacy, or any purpose that attributes positions to FNF, KKF, or Rajneethi beyond the scope of this research.

## KKF DISCLAIMER

This publication is an independent research report based on a structured opinion survey conducted among selected respondents from India's academic, business, policy, media, and civil society sectors. The findings, interpretations, and analyses presented in this report reflect the perceptions of the survey respondents and the editorial board's or author(s)' analytical assessment of those perceptions. They do not constitute policy recommendations, nor do they represent the official views, positions, or endorsements of: the Government of India; any ministry, constitutional authority, or public institution; any political party or elected representative; or the trustees, founders, advisors, or associates of the Kalinga Kusum Foundation. The Kalinga Kusum Foundation's role in this project was limited to that of a non-partisan knowledge partner and facilitator of research dialogue. The Foundation does not advocate, endorse, or oppose any foreign policy, security, trade, or geopolitical position discussed in the report. The study should be read strictly as a survey-based analytical document, intended to enhance public understanding and informed discussion. It must not be interpreted as an expression of institutional opinion, political alignment, or governmental stance, nor should it be cited as such. Any reference, quotation, or use of this report must clearly acknowledge its independent, non-political, and non-prescriptive nature. Misrepresentation of the report or its association with any political authority or policy position is expressly discouraged.

