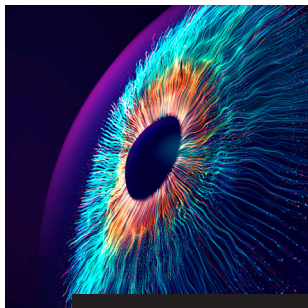
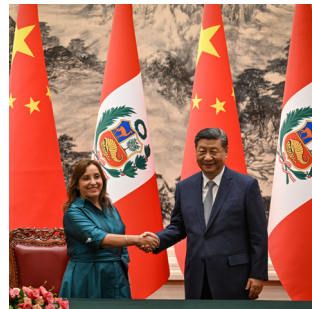


SPECIAL REPORT

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The World in 2024: An Epilogue

Harsh V Pant
Editor



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Introduction

Harsh V Pant

The world in 2024 was turbulent. Despite election cycles across the world dominating the year, the distance between the governed and the governing elite seemed to have only grown, as leaders lost credibility faster than they could craft a credible narrative. From Europe to Asia, and from Latin America to Africa, political systems struggled to respond to the rapidly evolving aspirations of the people who in turn seemed perpetually disillusioned with the leadership on offer. If the return of Donald Trump to White House was a manifestation of the melding of global and local, the fall of Bashar al-Assad was a reminder of the inherent fragility of authoritarianism. As domestic challenges continued to dominate the political mind space,

the global order faced a void with an all-round collapse of the architecture put in place in the aftermath of the Second World War.

And in that void, the primal urge of inherent anarchy in the international system reverberated with the return of force as the preferred instrument of inter-state relations. Yet, fighting wars has always been a nasty business. The political, economic, and moral corrosion caused by wars is often difficult for distant onlookers to decipher. For people who are not involved directly, wars can be a largely audio-visual experience, to be imbibed merely as information or entertainment, devoid of their political and strategic contexts.

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For a large part of the developed world, which had lulled itself into believing that wars would only be fought in faraway lands without imposing any massive direct costs, 2024 was a moment of reckoning.

The revival of geopolitical competition, particularly between Western liberal democracies and authoritarian powers like Russia and China, as well as the wars in Europe and the Middle East, have all challenged the post-Cold War optimism about the stability of liberal democracy. They have highlighted the vulnerabilities in the global order, the challenges of economic interdependence, and the fragility of international institutions. The return of traditional power politics, where military force is used to redraw borders, has revealed the limits of liberal triumphalism and reaffirmed that ideological and geopolitical conflicts remain very much at the core of the international order. The wars in Ukraine and the Middle East are a stark reminder that history continues to unfold in unpredictable and often violent ways. Conflicts in regions like the Sahel and the South China Sea illustrate how global powers now compete in indirect, localised conflicts, influenced by resource competition, territorial disputes, and ideological rivalry. Technological advancements are reshaping military strategies and battlefields.

Today's world is one that is being moulded by the forces of geopolitics in more than one way. The Ukraine war, the Israel-Hamas conflict, the flaring up of threats to sea-lanes that are critical for global trade, and, of course, the China challenge—all these are forcing policymakers across the globe to look at this crisis-ridden world through a new lens. The earlier hubris that economic forces would drive global politics is now being shunned, as some of the most forceful defenders of economic globalisation are being forced to have a rethink.

The rise of Donald Trump in US politics was itself a response to the uneven benefits of globalisation, and he dramatically changed the American political discourse on the issue. Trump's arrival with a bigger bang in 2024 than in 2016 has demonstrated that his earlier victory was no fluke, and it heralded a wider shift in America's engagement with the rest of the world. The US Vice President and Democratic party nominee Kamala Harris and Trump represented two strikingly different visions of the US—as seen in their positions on immigration, trade, cultural issues, and foreign policy—and American voters have given their verdict. Trump's first term in office laid the foundations of a dramatic re-orientation in America's engagement with the world, economically and strategically. The isolationist streak now dominating American body politic is a warning to the rest of the world that has become far too dependent on the US as the key guarantor of global security.

As disillusionment with the major powers sets in, it is the voice of the Global South that needs amplification. It is the Global South that is likely to drive global growth in the coming years, if present trends are anything to go by, with India being one of the top performers. It is therefore imperative for the developing world to have this reality better reflected in the agenda of global governance. From climate and energy transitions to the regulation of artificial intelligence, the role of the Global South and nations such as India should be critical. For that, new coalitions and a more focused agenda will have to be formulated.

This is India's moment, as New Delhi finds itself in a geopolitical and geo-economic sweet spot when the China story has lost some of its sheen. With the developed world looking inwards and China's aggressive orientation towards the outside world, there is a leadership vacuum that needs to be filled. In 2024, New Delhi continued to make its impact on the global order by making choices and shaping outcomes reflecting not only its own concerns and interests but also those of a large part of the world often missing from global discourse.

This annual report from ORF researchers takes stock of the year gone by. It delineates three key trends that shaped different geographies and domains in 2024. The first section looks at major powers as the US-China contestation sharpened and the rise of Trump continued to roil Europe. Russia also seems much better placed as the year ends with the Trump factor also impacting the possible conclusion of the Ukraine war in 2025.

The second section tackles key geographies. If the Indo-Pacific saw a broadening of agenda in terms of facilitating cooperation and collaboration among regional states against the backdrop of a worsening security environment, the Middle East saw the rise of non-state actors reconfiguring an already volatile region. The Central Asian Republics moved toward greater regional integration amid intensifying great-power competition, even as China made rapid strides in Latin America—an economically laggard region. Africa demonstrated democratic resilience, and closer home in South Asia, perennial economic challenges continued to shape countries' politics and geopolitics.

The final section examines some key global themes and issues of the past year; the shadow of geopolitics loomed large everywhere. On the battlefield, unmanned capabilities took centre stage even as the enduring relevance of attrition and adaptation has been made clear by all the ongoing conflicts. Trade War 2.0, focused on the control of new technologies, intensified in the past year even as resilience, agility, and reliability of the global value chain network was tested to its limits. The world grappled with the widening gap in climate adaptation efforts between the Global North and Global South. A fragmented world

struggled with technology governance issues while the regulatory frameworks for emerging health technologies also struggled to keep pace with the breakneck speed of innovation. The global development agenda remained fragile but saw the Global South taking center stage, reconfiguring economic diplomacy and partnerships.

As we move into 2025, the key trends identified in this report will continue to influence our external environment. Our aim is for the insights presented here to inspire deeper discussion and promote more constructive policy conversation—not only to gain a better understanding of the world, but also to navigate it effectively with a forward-looking perspective.

I

Major Powers

The United States **A Nation Splits**

Vivek Mishra

The year 2024 will be remembered as among the most consequential in the United States's (US) modern history, marked by intense political contestations, evolving societal dynamics, and shifting global alignments. Three key trends defined the year: the domestic impulses of a closely contested presidential election; the amplified impact of global conflicts on America's policies and psyche; and the international implications of Donald Trump's return to White House.

A Nation Divided

The 2024 US presidential election stands out as one of the most closely contested in American history. The stark choice between Democrat Kamala Harris, who would have become America's first woman president if she was elected, and Republican Donald Trump, who sought a political comeback, highlighted the depth of the country's ideological divide. Ultimately, Trump secured a victory that reflected the deep-seated polarisation of the electorate. Electorally, Trump created history by securing all the swing states and decisively beating Harris while also winning popular votes against expectations.

This election reinforced the reality that, at present, American society is one of the most divided in the world. Virtually split in half, the electorate's choices reflected contrasting visions of America's future. Issues like immigration, inflation, and the influence of conservative populism took centre stage in the campaign. While Democrats focused on progressive reforms and social justice, Republicans doubled down on a narrative of economic security and cultural conservatism.

Despite these divisions, the US continues to be one of the most stable large economies, attracting people from around the globe, reflected in the number of immigrants (both legal and illegal) to the US. Yet, this paradox—of being a beacon of hope while struggling with internal fractures—remains a defining feature of contemporary America.

Changing Political Identity

The interplay between global conflicts and domestic concerns loomed large in 2024 in the US, shaping political debates and public opinion. Nowhere was this more evident than

in the nationwide campus protests against the Israel-Hamas conflict in the Middle East. These demonstrations revealed a generational divide,¹ with younger Americans advocating for a demonstrably pro-two-state solution in its foreign policies while the older political elite leaned towards supporting Israel's right to defend itself. This demographic shift signals profound changes in the American political landscape, where the priorities of younger voters increasingly diverge from traditional American foreign policy stance.

These trends were also visible in the evolving internal dynamics of the Democratic and Republican parties. The Democratic Party leaned further into centre-left politics, championing issues like climate change and social equity, while the Republican Party embraced more overtly conservative positions. Today, both parties are far removed from their historical roots, reflecting the pressures of modern-day governance and the demands of an increasingly polarised electorate.

These transformations have had significant implications for America's foreign policy. The rise of Donald Trump as the Republican standard-bearer underscores the shifting priorities of the American right, with a focus on nationalism, economic protectionism, and reduced international commitments. The culmination of these trends has reshaped the global perception of the US as a fractured yet formidable superpower.

Trump's Comeback

Donald Trump's victory in 2024 marked the beginning of a new chapter in American governance and global geopolitics. Even before assuming office, Trump's rhetoric and early decisions have signalled a resolute and uncompromising approach. His promise to create a Department of Governance Efficiency (DOGE)² and the appointment of loyalists to key positions has hinted at a more centralised and decisive impending presidency.

Internationally, Trump's second term promises profound implications. His emphasis on tariffs and economic nationalism is likely to strain relations with major trading partners like China, Canada, and Mexico. Middle powers such as India, bracing for potential economic repercussions, may need to recalibrate their strategies to better manage US policies. However, broadly, Trump's approach could accelerate the trend of inward-looking nationalism globally, leading to a more fragmented world order. The ripple effects of Trump's policies may also redefine alliances and international institutions. A transactional approach to diplomacy, where connections are brokered rather than being based on shared values, might erode multilateral frameworks and exacerbate geopolitical instability. As the world's largest economy shifts its focus inwards, the broader implications for global trade, security, and governance will be significant.

The year 2024 encapsulated the complexity of modern America—a nation grappling with deep internal divisions, evolving political identities, and a volatile global environment. Domestically, the razor-thin presidential election highlighted the persistent divide within the electorate. Internationally, the interplay of domestic impulses and global conflicts reshaped America’s policies

and its role on the world stage. As Donald Trump prepares to lead the country once again, the world braces for the impact of his policies, which promise to redefine international relations and economic norms. For the US, 2024 was not just another election year; it was a crossroads, reflecting the challenges and opportunities of a nation striving to reconcile its domestic identity with its global responsibilities.

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China

The Slowdown Continues

Atul Kumar and Antara Ghosal Singh

Multiple events in China during 2024 kept analysts and observers vigilant throughout the year. The year's end provides a fitting moment to evaluate the key trends that shaped the nation and influenced international politics, the global economy, and the security landscape.

Economic Slowdown

China's economy remained sluggish throughout 2024, falling short of analysts' expectations for a rapid rebound or a strong post-pandemic recovery. Factory output,¹ consumption, and investment

slowed more than expected. The unemployment rate rose² to a six-month high of 5.3 percent in August, while the urban youth unemployment rate rose to 17.1 percent in July, up from 13 percent in June. The country's economic challenge has been attributed to four primary factors:³ a downturn in the real estate market; a lack of significant consumer spending following the economy's reopening; deteriorating local government finances threatening a sharp slowdown in investment; and China's private sector remaining weak after the policy crackdowns of the past several years.

China's economic challenges are compounded by the demands of an ageing population and ongoing trade tensions with the United States (US).⁴ Given the circumstances, a narrative that “the Chinese economy has peaked” is gaining currency among the international community. However, Chinese scholars reject this notion, asserting that China still has many development opportunities and a strong determination to realise its dream of Chinese-style modernisation.

Widespread Corruption

China's slowing economy has been further strained by corruption among its political and military elites.⁵ Access to land, financing, and favourable regulations often depend on personal connections to the ruling elite, making business success heavily

dependent on elite support and opening up vast opportunities for corruption. Additionally, in both military and civil sectors, promotions⁶ are driven mostly by ideological and political reliability rather than merit. This factor has entrenched corruption within the bureaucracy and military.

In 2024, Xi Jinping dismissed numerous senior military officers, including defence ministers and defence industry officials, and purged the top leadership of the PLA Rocket Force. He dismantled the PLA Strategic Support Force and prosecuted senior bureaucrats. Despite these high-profile campaigns to catch tigers and flies, corruption in China remains pervasive. Over the past 12 years, Xi has launched multiple anti-corruption campaigns, but they have failed to produce a significant or lasting impact on reducing corruption in the country.

Trump and a Fear of Tougher Times

China remains concerned that Trump's victory in the US elections may reverse the diplomatic gains made during the Biden administration, which brought relative stability⁷ to US-China relations. Most Chinese scholars, therefore, preferred Kamala Harris's moderate policies, operating largely within the Biden framework. Trump, however, is feared to bring greater uncertainty to Sino-US relations.

Nevertheless, the Chinese side is bracing for tough times ahead. Most Chinese observers⁸ believe that the US has firmly locked China in as its biggest rival, making it difficult to ease the Sino-US conflict in the short to medium term. They expect endless competition around power, wealth, and technology during Trump 2.0.

Others, however, believe that China should get rid of its "Trump phobia"⁹ for several reasons. First, the importance of the US in China's global strategic layout is already declining. Eight years ago, in 2016, China's trade with the US accounted for about 15 percent of China's total foreign trade; this figure has dropped to 11 percent.¹⁰ Second, the US containment strategy of China has its limits, and China has already gained experience in coping with and retaliating against the US's policies. Finally, America remains starkly divided, and Trump will struggle to unite the country, and much more to lead the world. Domestic politics, not rivalry with China, will dominate Trump's policy.

The Chinese strategic community is divided on how to respond to Trump 2.0. While a section has been advocating arm wrestling¹¹ with the US, others prefer keeping a low profile and avoiding a confrontation.

Conclusion

Overall, 2024 has proven difficult for China. Economic woes have disproportionately impacted the lowest strata of society, leaving many feeling hopeless. Endemic corruption and the concentrated hold over financial and political power by the Chinese elite have inflamed frustration and discontent in Chinese society. This has manifested in both passive forms of resistance and more violent acts, including knife

attacks and vehicle rampages. The resurgence of the ‘Zhang Xianzhong’¹² phenomenon in public discourse has heightened the Chinese central government’s concerns. Therefore, China’s lifetime President, Xi Jinping, will have to devise innovative strategies to bring China back from the brink.

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Europe

Chaos, Competitiveness, and China

Shairee Malhotra

As the Russia-Ukraine war nears its third anniversary in February 2025, political chaos and far-right surges persist in Europe. Other key trends from the year include a shift in Europe's green agenda towards competitiveness and a marked deterioration in EU-China ties.

Political Chaos and Uncertainty

The European Parliament elections in June resulted in the centre retaining power, with the victory of the centre-right European People's Party, followed by the centre-left Socialists and Democrats. Yet, despite the centre holding, the far-right simultaneously gained ground, becoming the third largest force in the European Parliament after the creation of the new Patriots for Europe group.

While far-right parties made headwinds in elections in Eastern Germany, the country's three-way coalition government collapsed over rifts in budgetary policy, leaving Chancellor Olaf Scholz heading a minority government while presiding over a German economy facing its second year of recession. In France, a snap election culminated in a French lower house of Parliament ruled by three competing ideological blocks, making it almost impossible to pass key decisions involving reforms and laws. In December 2024, Prime Minister Michel Barnier lost a no-confidence vote over the budget after only three months in office, plunging the Fifth Republic into further political chaos.

As Europe braces for a second Trump presidency and the uncertainties it augurs for European security and economics, it is a perilous moment for Europe's Franco-German motor to be riddled with domestic instability. Meanwhile, Central and Eastern European member states such as Poland and the European Commission are stepping in to fill the leadership vacuum.

From Green to Competitive

2024 saw climate change relegated in the EU agenda, overtaken by more contemporary imperatives of security and defence, economic challenges, and industrial competitiveness. Pressures from the political right, farmers' protests, and global trade tensions resulted in a dilution of the European Green Deal—the EU's ambitious initiative to make Europe the world's first climate-neutral continent.

While the European Commission has pledged to follow through on the Green Deal's climate goals, the terminology and focus has shifted to decarbonisation driven by measures to boost the competitiveness of the European economy. In this context, the Commission has introduced a Clean

Industrial Deal,¹ the text for which is expected to be released in early 2025, with a reframing of the European green agenda with economic competitiveness at its core.

The Clean Industrial Deal aims to boost European industry, strengthen industrial sovereignty through scaling up manufacturing for green technologies (most of which Europe currently imports from China), simplify regulations, and cut bureaucratic red-tape to reduce compliance burdens. Such measures, by reducing the costs of the green transition, would enable higher buy-in and support from Europe's industrial and agricultural sectors while pursuing the simultaneous imperatives of decarbonising and industrialisation.

According to former Italian prime minister and European Investment Bank chief Mario Draghi's report² on European competitiveness, Europe needs 800 billion euros of investment annually, coupled with a new industrial strategy, to boost growth.

However, Europe's quest for competitiveness continues to face challenges from countries such as China and its dominance in green tech and the United States with its Inflation Reduction Act aimed at stimulating local clean energy production, amidst Europe's comparatively higher energy costs. These challenges are likely to be amplified by an uncertain economic environment ushered by Trump 2.0.

Deterioration of EU-China Ties

The marked deterioration in Europe's ties with China was underpinned by escalating trade tensions and a strengthening of the China-Russia alignment. In October 2024, the EU voted to impose tariffs on Chinese electric vehicles (EVs),³ based on the latter's alleged subsidies, leading to industrial overcapacity and impacting European

producers. Beijing responded with its own subsidy investigations on European brandy, pork, and other products. Meanwhile, Europe has continued with the difficult task of de-risking from China, amidst high strategic dependencies, through export controls, investment screening mechanisms, diversifying supply chains and economic partners, and measures such as the Critical Raw Materials Act.⁴

Irrespective of challenges, European attitudes towards China are progressively turning hawkish, with more attention being paid towards China's "no limits" partnership with Russia and Chinese support for Russia's war economy through the exports of dual-use technology. Although the partner and competitor elements of the EU's China outlook remain intact, especially with reference to challenges like climate change, the systemic rival component has gained greater salience.

Russia

A Smooth Year with a Few Bumps

Nandan Unnikrishnan and Rajoli Siddharth Jayaprakash

The year 2024 saw public opinion in Russia swinging in favour of negotiations to end the conflict in Ukraine, despite gains on the warfront and an economy that grew amid debilitating Western sanctions.

The defeat of Bashar al-Assad in Syria and the rising danger of nuclear weapons in the Ukraine war were the only dark clouds in an otherwise near-flawless year for Russian President Vladimir Putin, who began with an expected but still impressive win in his fifth presidential elections in March, garnering more than 87 percent of the vote. Nevertheless, there were grim reminders that corruption continues to besmirch the top echelons of government and that inflation could undermine the gains of economic growth.

Stable Domestic Politics

Although Putin's victory reflects his popularity and ability to deliver stability to his constituents despite the country being under sanctions for over a decade, the Ministry of Defence was mired in scandals, of which public criticism remains scarce. The corruption crisis saw the entire top leadership of the Ministry replaced and Defence Minister Sergei Shoigu being removed in order to head the National Security Council. The erstwhile head of the Council, Nikolai Patrushev, widely seen as the most influential person after Putin himself, was moved to handle the shipbuilding sector—another reminder that foreign experts' exercise of ranking the importance of officials in Putin's inner circle is often based as much on fiction as on fact.

However, domestic instability appears distant and is unlikely to rear its head unless there is a dramatic change in the economic well-being of the population.

Russian Military's Territorial Gains

On the ground, the Russian military in 2024 was able to gain six times more territory than it did in the previous year, raising the possibility of overrunning Ukrainian defences. The military's advance in Eastern Ukraine was not deterred by Ukraine's counter-offensive in the Kursk region in early August.

However, the Biden administration supplying Western weapons that allowed Ukrainians to strike deep into Russian territory has exacerbated an already volatile situation. The Russians responded with a spectacular display of the capabilities of the unarmed nuclear-capable multiple-warhead medium-range ballistic missile Oreshnik in Dnieperpetrovsk. They also revised their nuclear doctrine, lowering the threshold for a nuclear response.

Emerging Peace Interests and Global Support

The Trump Presidency, the escalation of the conflict, and global public sentiment has heightened support for ending the Ukraine conflict, especially in the non-Western world, where the war and consequent sanctions have had significant economic impact.

As war fatigue creeps up in the European Union and NATO countries, a number of them, such as Hungary, Slovakia, and Türkiye, along with the developing world and emerging markets, have openly advocated for ending the war.

The Trump presidency in the United States (US) has created public expectation that prospects for peace in Ukraine have improved. However, experts are less hopeful, suggesting that the outgoing US administration's escalatory support for Ukraine is only exacerbating an already complex problem. Additionally, Russia's concerns about Europe's security arrangements after the collapse of the Soviet Union could be a deal-breaker as this will require a separate negotiation between the US and Russia.

Meanwhile, Western attempts to diplomatically and politically isolate Russia appear to have failed. Putin visited China, Uzbekistan, Vietnam, Azerbaijan, Kazakhstan, Mongolia, Turkmenistan, and North Korea this year. Putin's visits to Pyongyang and Hanoi saw the signing of updated strategic friendship treaties. This year also marked Russia's presidency of BRICS. The 16th BRICS summit, held at Kazan, had more than 36 participating delegations, including 20 heads of state, reflecting Moscow's heft in the non-Western world.

Moscow's relations with India continued to improve. Indian Prime Minister Narendra Modi met Putin twice this year in Russia. Russia is poised to maintain its primacy in energy supplies to India in 2025, and New Delhi is expected to boost the movement of human resources to Russia in the next year. Russia's ties with China, though improving, have also experienced unexpected challenges, particularly in economic ties; according to some Russian experts, China's economic support is falling short of expectations.

Challenges Ahead

While 2024 has been broadly positive for Russia both geopolitically and domestically, substantial challenges remain. Internationally, Russia is yet to build a stable financial system that will allow it to receive and make payments while skirting sanctions and, if possible, avoiding Western currencies. It needs to strengthen and build transport corridors to the new markets it is seeking in Asia, Africa, Latin, and South America.

Tackling the economic situation will also be essential for domestic stability. The primary task will be reining in inflation while ensuring an equitable spread of resources for military needs and welfare measures to maintain macroeconomic stability. Additionally, Russia will need to adjust its labour and migrant policies to deal with current demographic challenges.

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II

Key Geographies

The Indo-Pacific In Constant Flux

Sayantana Haldar and Pratinashree Basu

The year 2024 witnessed heightened global conflicts and challenges, with more players getting embroiled in protracted tensions. While this may have led to the view that the Indo-Pacific would perhaps take a backseat in the global geopolitical agenda, regional players fostered partnerships and collaboration, even as competing interests persisted. The region continues to remain in flux, marked by a changing regional order and the emergence of new challenges.

Broadening Agendas for Regional Cooperation

In many ways, the “Confluence of the Two Seas” speech delivered by former Japanese Prime Minister Shinzo Abe at the Indian Parliament in 2007, marked the birth of the Indo-Pacific construct. Since then, the idea of the ‘Indo-Pacific’ has been deployed to usher in a new regional security complex, with engagements in the region remaining focused on sea lines of communication, freedom of navigation, and security cooperation. At the same time, there was a broadening of the agenda in terms of facilitating cooperation among states.

New domains of cooperation in the Indo-Pacific include maritime domain awareness, technology, health security, education, people-to-people ties, climate action, as well as humanitarian assistance and disaster relief. The Quad leaders' summit in Wilmington in September 2024 sought to concretise cooperation across many of these domains. Therefore, a new impetus of reimagining the Indo-Pacific as a dynamic regional rubric is likely to guide how states engage with each other to harness shared opportunities. This will mark a shift in the idea of the Indo-Pacific from being a security theatre to a comprehensive regional construct.

Exacerbated Security Environment

The regional security environment has remained vulnerable, with the epicentre of the security crisis being the South China Sea. Over the years, China's claims of territorial sovereignty in the South China Sea have been matched by more coercive tactics, leading to contestations among other littoral countries such as the Philippines. In

2024, there was a marked shift in the nature of heightened Chinese aggression in the Indo-Pacific. Tensions peaked in the region following physical confrontations between Chinese and Philippine fishing and naval vessels and have led to sustained tensions and persisting China-led grey-zone tactics.

Beijing's advances have systematically sought to challenge a free and open Indo-Pacific. Consequently, compounding the demands on likeminded countries pursuing an agenda of a democratic rules-based order in the Indo-Pacific and seeking to bolster their resolve against China. The emergence of a new minilateral grouping—the Squad, comprising the United States, Japan, Australia, and Philippines, and focused on preserving a peaceful order in the South China Sea—has prompted a new dimension of direct contest between China and advocates of a rules-based order in the region. The region also saw heightened military expenditures, particularly in missile systems, drones, and naval capabilities. Japan's historic defence budget increase and India's strides in indigenous military production reflect this trend.

2024 Elections Reshaped the Indo-Pacific

The past year was a year of elections globally. In the Indo-Pacific, 10 countries held general, parliamentary, or presidential elections (namely, the US, India, Indonesia, Thailand, Cambodia, Leste, Taiwan, South Korea, Fiji, and the Solomon Islands). The 2024 elections reflected the diversity and complexity of the Indo-Pacific, a region marked by varying levels of democratic development and geopolitical significance, with outcomes that resonate far beyond individual nations.

The 2024 elections across the Indo-Pacific highlighted both democratic resilience and ongoing challenges. Countries like India, Indonesia, and Taiwan reaffirmed their democratic commitments despite internal and external pressures. In Thailand, the path remained fraught, caught between entrenched military influence and growing public demand for progressive governance. India's leadership, elected for a third term, reaffirmed India's

trajectory as a key Indo-Pacific player focused on policy continuity and deepening strategic partnerships. Indonesia's transition to a post-Joko Widodo era holds implications for ASEAN, while Taiwan's election underscored US-China tensions over cross-strait relations. Meanwhile, Cambodia's Senate elections have kept its government firmly aligned with China. In Fiji and the Solomon Islands, elections influenced balancing ties with Beijing on the one hand, and Washington and Canberra, on the other. For its part, Myanmar postponed its elections, contrasting with the democratic momentum in other nations.

The previous Trump administration was instrumental in re-elevating the Indo-Pacific as a strategic concept, which bolstered the Quad and India's role as a regional security player. With Washington set for Trump's second term, key issues such as security, trade, tech cooperation, and immigration would likely be significantly impacted. Going forward, regional middle powers, including India, will likely play more assertive roles in shaping multilateral forums and setting agendas on critical issues such as digital connectivity, climate action, and maritime security.

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The Middle East

A Persistent Churn

Kabir Taneja

In 2024, the Middle East region remained on the precipice as the war in Gaza continued, Hezbollah and Israel adopted formalised military postures against each other, Israel and Iran exchanged missile fire and, by year's end, the Syrian government of Bashar al-Assad collapsed.

The past year saw events in the region that would be worth decades. Historically, conflict has never been far from the region's reality. Yet, the current complexities have the potential to derail much of the progress made in the region over the decades. There are silver linings, however,

beyond the wars, mounting civilian casualties, and threats of collapsed states. The Abraham Accords of 2020, which normalised relations between Israel and a group of Arab states led by the United Arab Emirates (UAE), continue to hold. Similarly, the political ties between Saudi Arabia and Iran, normalised only recently, have remained intact. The relative calm in the usually contentious Strait of Hormuz, a waterway in the Persian Gulf which carries 18 percent of the world's daily oil trade, can be attributed to this. What remains the core crisis in the region is the Israel–Iran contestation, which is playing out in multiple iterations across the board.

Three trends have anchored opportunities and challenges for the region in the past year, and these are expected to shape much of the geopolitics and economics of 2025 as well.

Rise of Non-State Influence

The almost undramatic collapse of the Assad regime in Syria, after over half a century of the family's reign in Damascus, has come as a shock to many in the region. As former Al-Qaeda and Islamic State-aligned Islamist leader Abu Mohammed al-Jolani of the Hayat Tahrir al-Sham (HTS) group walked into the Syrian capital unchallenged, the unease in the country's neighbourhood was palpable. Both the UAE and Qatar have highlighted in the recent past that the rise of non-state actors in parts of the Middle East is an evolving challenge, advocating diplomacy and outreach over military solutions.

If HTS stakes a political claim in Syria, it will be the second major state after Afghanistan to have a radical militant entity at its helm. Al-Jolani continues to have a US\$10-million bounty on his head in the United States. But beyond HTS, groups like Hezbollah, the Houthis, Hamas, and various other rebel groups across the region will continue to disrupt the region in the next year, despite facing pushback, predominantly from Israel's military.

Remoulding of Big-Power Interests

The past year of chaos in the Middle East has shown that the US remains the only power with tangible and applicable influence in the region, even with countries like Iran. Despite narratives of American decline, the gap between presidential changeover from Biden to Trump is being navigated cautiously by all parties. However, 2024 has also shown a fundamental change in US approach, with its regional relationships now focused more on security and prosperity, rather than the broader ideological goals of 'Pax Americana' and the promotion and installation of democracy. This naturally means that the US relationship with most of its partners has fundamentally changed, as many Arab states also look to hedge their own bets, practicing multi-alignment and strategic autonomy by expanding ties with the likes of China and Russia.

China and Russia have both, however, gained limited space. While Beijing has put its proverbial eggs in the Arab basket, specifically over Gaza, it still must manage its relations with Iran with whom it signed a multi-billion-dollar strategic deal in 2021. The Syrian crisis has also challenged Moscow's regional influence zone, with its two military bases on the Syrian coast facing an uncertain future.

Business Amidst Bedlam

Finally, the region's geoeconomic trajectory remained intact in 2024, driven largely by the UAE and Saudi Arabia. However, larger connectivity projects, such as the India-Middle East-Europe Economic Corridor (IMEC), remain largely on the drawing board. Both the UAE and Saudi Arabia remain bullish on their core interests, which is economic ascent, and in return for which geopolitical stability is crucial.

With the fall of Syria adding further to instability in the Middle East, the challenges for 2025 will expand. Nonetheless, the likes of Riyadh and Abu Dhabi are expected to remain at the forefront of global progress, specifically in areas such as technology, AI, and green energy. The centrality of the region's large oil-backed sovereign funds will also maintain global interest in these success stories. From Asia's point of view, these funds will likely be channelled into developing economies such as India, Vietnam, Indonesia, and even China. The economic interests may also push Middle Eastern states to assert their own security to ensure uninterrupted prosperity.

Central Asia

Beyond Traditional Alliances

Ayjaz Wani

After overcoming numerous internal challenges in 2023, the Central Asian Republics (CARs) emerged as key players in global affairs in 2024. Pursuing national interests, economic diversification, and greater strategic autonomy has made the CARs the object of intensified competition, particularly among the European Union (EU), the United States (US), China, and Russia. Meanwhile, the growing security concerns from the Taliban have compelled the CARs to forge trade relations with Afghanistan and engage in diplomatic discussions to ensure connectivity and address the challenges posed by terrorism. Additionally, there has been a deepening of military, defence, and economic cooperation among Turkic states to enhance regional security, connectivity, and prosperity.

Afghanistan and Regional Integration

The security vacuum created by the US withdrawal from Afghanistan and the ongoing Russia-Ukraine war has forced the CARs to adopt a conciliatory approach towards the Taliban. The CARs have realised that remaining distant from Taliban-led Afghanistan would only escalate the conflict, and the presence of many Central Asian terror groups in the region would further complicate the situation. Consequently, the CARs have increased their trade and economic cooperation with the Taliban, underscoring the importance of connectivity to Afghanistan via bilateral and trilateral meetings. Kazakhstan, the regional heavyweight, removed the Taliban from its list of banned organisations, and Tajikistan improved its economic relations with the Taliban through the supply of energy.

Following decades of stagnation, the CARs have also increased their people-to-people interactions to create a more interconnected region. Regional integration, security, and socio-economic cooperation were the region's priorities in 2024. After resolving its border disputes with the neighbouring CARs, Uzbekistan played a constructive role in mediating border issues between Tajikistan and Kyrgyzstan. Recently, both countries announced a border demarcation in the last contested areas, thus ending the decades-old territorial disputes that have killed hundreds of people.

China's Assertiveness; Russia's Retreat

Following the outbreak of the Russia-Ukraine war, the CARs have aimed to achieve strategic autonomy in connectivity, security, and trade by engaging diplomatically with new partners. However, China and Russia have sought to strengthen their own spheres of influence over the past two years through cooperative hegemony. After the Xi'an summit of 2023, Beijing has intensified its engagements with the CARs through high-level diplomatic visits across multiple sectors. In May 2024, President Xi Jinping visited Kazakhstan to participate in the 24th Shanghai Cooperation Organisation (SCO) Summit. Xi attended more

than 30 bilateral and multilateral events during his five-day state visit and also visited Tajikistan. In December 2024, China held the fifth China-Central Asia Foreign Ministers' meeting in Chengdu to implement the outcomes of the Xi'an Summit and reaffirm Beijing's commitments to collective security, resisting external interference in the region, and peace and reconstruction in Afghanistan.

The region is now increasingly apprehensive of Russia's role and has tried to establish new partnerships, even as Moscow remains committed to maintaining regional influence and strengthening diplomatic ties. In 2024, Russian President Vladimir Putin visited Kazakhstan, Turkmenistan, and Uzbekistan. Russia's focus included enhancing regional security, and discussions were held regarding comprehensive strategic partnerships and economic and energy cooperation. This includes plans to construct the first nuclear power plant in the region, in Kazakhstan, for which the Russian state-owned Rostam is a strong contender. Putin's visit to Kazakhstan also eased the relations between the two countries, especially after the Russia-Ukraine war and the ban on the imports of agricultural goods from Kazakhstan in October.

The West Steps Up Engagement

The Russia-Ukraine war has led to stricter sanctions that have disrupted trade with Europe and highlighted security and stability concerns that compelled the CARs to strengthen their engagement with the EU. In January 2024, the CARs and the EU held the Global Gateway Investors Forum in Brussels and pledged to invest US\$11 billion for sustainable connectivity through the Middle Corridor and regional integration. The CARs have remained the least connected economies despite China investing billions of dollars in the region through its Belt and Road Initiative, even as the EU seeks to minimise Chinese economic influence through these new initiatives and purchase more hydrocarbon resources.

The CARs have also begun implementing new policies to strengthen economic cooperation with individual countries in the EU, such as France, Germany, and the United Kingdom. In April 2024, UK Foreign Secretary David Cameron visited the region to promote trade and security and announced a series of measures to support the region's hard-won sovereignty. Similarly, German Chancellor Olaf Scholz visited the region in September 2024 to deepen cooperation on bilateral and foreign policy issues under the Z5+1

(CARs plus Germany) summit. The CARs also held a C5+1 dialogue with the US to discuss critical mineral supply chains, economic cooperation, and new connectivity projects with Europe. However, the CARs have historically been sceptical about the EU's inconsistent approach to the region. Sensitive issues, including human rights, the rule of law, democratisation, and the Afghanistan question, will determine the trajectory of this relationship.

The Year Ahead

Central Asia is no longer under the control of a single power and will attract more attention as global powers boost their geopolitical and geo-economic interests in the region. While the EU seeks to invest in economic diversification and improved connectivity, Türkiye plans to foster closer defence and economic cooperation based on shared histories and cultures. Beijing will increase its diplomatic efforts to further its economic and strategic interests amid Russia's preoccupation with the Ukraine war. The CARs will utilise this increasing global focus and geopolitical competition among regional powers not only for economic development and collaboration but also for a multi-vector foreign policy, seeking greater strategic autonomy.

Latin America

China Gains Foothold

Hari Seshasayee

Latin America remains far removed from the most serious crises in the world today, be it the war in Ukraine, the Israel-Palestine conflict, or the Syrian proxy war. The region's position as a 'bystander' allows its governments to focus on domestic and regional issues of greater importance—as in the case of the recent Mercosur-European Union Free Trade Agreement, which concluded after 25 years of negotiations. This relatively unencumbered position allows the region to balance its geopolitical interests and make the best of what both Washington and Beijing have to offer while also parlaying with Europe and other countries like India.

China Makes Strides in the Region

Beijing took particular notice of Latin America in 2024, making more serious overtures to the region and bringing it much closer to its own orbit and away from the United States (US)—which will likely turn more protectionist and impose high tariffs on the region in 2025. China grabbed headlines in November, as President Xi Jinping inaugurated Peru's Chancay port and attended the Asia-Pacific Economic Cooperation (APEC) Summit in Lima. The port, built by China COSCO Shipping Corporation with a US\$1.3-billion initial investment, is Beijing's most successful Belt and Road Initiative (BRI) project in Latin America.¹

It is expected to boost China's trade with South America and, more importantly, stands as an example of what Beijing is capable of in the region.

Perhaps equally significant is China's outreach to Brazil, highlighted by Xi's state visit in November, following the APEC Summit. In addition to the 40 cooperation agreements signed by the two countries, two marquee projects deserve mention: Chinese satellite company SpaceSail (a competitor to Elon Musk's Starlink) announced its entry to the Brazilian market, and the Brazilian Development Bank arranged for a first-of-its-kind loan from China Development Bank denominated in Chinese currency worth 5 billion yuan (equivalent to US\$690 million).²

Even Argentina's President Javier Milei, who had lambasted China as a "communist country" that he "would never trade with" during his election campaign last year, has now made a volte-

face and announced a trip to China in January 2025.³ In a recent interview, Milei said, "China is a very interesting trade partner, because they don't make any demands, they just ask that you don't bother them."⁴ Still, Mexico's government remains cautious of edging closer to Beijing, opting instead to place their bets on North America despite the threat of tariffs from newly elected US President Donald Trump.

An Economic Laggard in 2024

There is broad consensus among economists that Latin America is the unfortunate laggard of the global economy in 2024, registering the lowest growth rate among all regions, at only 1.9 percent as per latest World Bank estimates.⁵ The United Nations Economic Commission for Latin America and the Caribbean has also noted that the region "is mired in a decades-long growth trap" amidst weaker job creation numbers.

However, inflation is falling across economies in the region. Indeed, Latin America and the Caribbean may end 2024 with inflation at 3.6 percent, providing much-needed relief to a region that is still slowly recovering from the consequences of the COVID-19 pandemic.⁶ 2025 may see some upward trends, and the region can take advantage of two global trends: the opportunities that come with the green transition, where the region is poised to play a leading role given its abundant reserves of critical minerals like lithium, copper, bauxite, and zinc; and the region's strategic position as a near-shoring destination for investors looking to realign global value chains away from China and closer to the US and the West.

Politics Unchanged

The political pendulum swings regularly in Latin America, giving both the Left and Right equal opportunity in the region's democracies. While incumbent parties held their ground in the Dominican Republic, El Salvador, and Mexico, they were voted out of power in Panama and Uruguay. Most democracies in the region remain stable, but autocrats in countries like Venezuela and Nicaragua are showing no signs of relinquishing power. Yet, the region's governments now await the challenges that come with a Trump presidency in 2025. Some like Milei and El Salvador's Nayib Bukele will celebrate a Trump presidency, while others like Brazil's Lula da Silva, Mexico's Claudia Sheinbaum, and Colombia's Gustavo Petro will likely bear the brunt of Trump's vilification of the region.

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Africa

Democratic Resilience Amid Economic Woes

Samir Bhattacharya

Africa has had an eventful 2024. Civil wars and insurgencies continued to ravage many countries in the continent, exacerbating the humanitarian and political crises. At the same time, African agency became more pronounced, with more countries continuing to court Africa with Africa+1 Summit diplomacy through the Africa-Korea, Africa-Saudi, and the Forum on China-Africa Cooperation (FOCAC) Summits being held in the past year. Several African countries pushed external security forces out of their territories. Many liberation parties, including in South Africa, Botswana, and Mozambique, witnessed a decline in their traditional voter bases. On the economic front, continental growth remains at a critical juncture, though it marginally improved from the previous year.

Regional Conflicts

The year began with a significant shift in the Horn of Africa, when Ethiopian Prime Minister Abiy Ahmed signed an agreement with Somaliland, the breakaway region of Somalia, granting Ethiopia access to the Red Sea for commercial and military use in exchange for recognising Somaliland's sovereignty. The deal, set against a decades-long conflict between Ethiopia and Somalia over the Ogaden region, risks inflaming regional tensions involving Egypt, Eritrea, Sudan, and Djibouti.

Meanwhile, Africa's regional integration faced a setback as Burkina Faso, Niger, and Mali withdrew from ECOWAS, the West African economic bloc, to form the Alliance of Sahel States. The new grouping signals a blow to France, forcing the former coloniser and security provider to remove its troops from all three countries. With increasing anti-French sentiment in the region, some countries are now calling for the removal of United States (US) bases, opening the door for Russia's growing influence through its mercenary group, the Africa Corps. Many other African countries, such as Sudan, Mozambique, Democratic Republic of Congo, and Ethiopia, carried forward past conflicts, in 2024. The situation is particularly challenging in Sudan, where a 20-month-long civil war between two military generals claimed more than 62,000 lives and displaced more than 14 million people.¹

Democratic Resilience

It has been a challenging year for ruling parties in Africa, as politicians faced political headwinds. In May, South Africa's ruling African National Congress lost its majority for the first time since the end of Apartheid and was forced to form a coalition government with rival parties. In

early November, Botswana's ruling Botswana Democratic Party suffered a humiliating defeat after nearly six decades in power. In December, West African democracy Ghana also witnessed a change when opposition leader and ex-President John Dramani Mahama returned to power. These peaceful transfers of power in several countries are a testimony to Africa's democratic resilience.

One factor behind this shift is the rise of the youth as a political force. Disillusioned by the waning legacy of liberation movements, young Africans across the continent took to the streets en masse to demonstrate their disagreements with existing systems, evident in movements such as #FearlessOctober in Nigeria and #RejectFinanceBill2024 in Kenya. This youth-driven change became evident when Senegal chose Bassirou Diomaye Faye, a 44-year-old leader, as president. Further, 54-year-old Duma Boko emerged as the leader in Botswana. With 70 percent of Africa's population under 30, this generational shift marks a turning point for a continent once dominated by older leadership.

Economic Recovery

At the start of the year, the World Bank projected a 3.4-percent growth rate for Africa; the estimate was later reduced to almost 3 percent, primarily due to the ongoing war in Sudan.² While this growth improved over 2023, it remained sluggish, far from the above 5-percent growth during the 2000-2014 period, particularly against the backdrop of recovery from the COVID-19 pandemic. In 2023, 18 African countries reported a debt-to-GDP ratio exceeding 70 percent, which hardly improved in 2024.³ With ongoing global geopolitical uncertainties, staggering debt service costs, and threats of armed conflicts and climate disasters across the continent, fiscal stability remained elusive. Throughout the year, African policymakers faced challenges in increasing tax revenue while controlling inflationary pressures.

The Way Forward

As global conflicts continue to disrupt global dynamics, Africa's future is interlinked with these developments, making the coming year challenging for the continent. On the one hand, initiatives like the African Continental Free Trade Area could reduce dependence on external markets and boost regional integration. On the other, without external investments and considering the current high levels of debt, it will be difficult to fund key sectors like health, education, and climate action, which require an estimated US\$1.2 trillion by 2030.

Creating new jobs will be essential, especially with a growing youth population entering the job market each year. Strong leadership and innovation will be crucial to navigating domestic and global challenges. In 2025, South Africa will host the G20 summit. Expectations are high for South Africa to champion African issues effectively. As 2024 draws to a close, Africa will enter 2025 with a mix of trepidation and cautious optimism.

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South Asia

The Economy Takes Centre Stage

Shivam Shekhawat and Aditya Gowdara Shivamurthy

South Asia, with an average economic growth rate of 6.4 percent, is the fastest growing region among emerging and developing economies. Nonetheless, the region's economies remain vulnerable. In the past year, countries in the region have had to grapple with a host of economic challenges.

Persisting Economic Challenges

Tourism has aided economic recovery in Bhutan, Sri Lanka, Nepal, and the Maldives, but structural issues persist. These include natural disasters, over-reliance on remittances, outward migration, food

and fuel inflation, trade and fiscal deficits, limited domestic production capacities, and debt burdens. Throughout 2024, Sri Lanka has struggled to finalise its debt restructuring agreements while continuing its International Monetary Fund (IMF) programme; the Maldives has sought debt restructuring and explored domestic solutions to its economic hardships; and Bhutan has sought external assistance to sustain its economy, with India offering US\$15 billion for an economic stimulus package to kickstart the local economy, and another US\$85 billion to supplement its five-year plan.

Bangladesh, meanwhile, continues to confront challenges of inflation, corruption, and external debt, compounded by recent political disruptions. In Nepal, the flash floods in September caused massive economic and human losses, resulting in losses amounting to nearly 1 percent of the country's Gross Domestic Product (GDP). In Pakistan, the IMF approved a loan of another US\$7 billion.¹ While this, combined with other factors, did give an immediate push to the stock market, issues like low tax collection, structural factors like excessive borrowing, trade deficit and low Foreign Direct Investments (FDIs) remain. In Afghanistan, while the economy has relatively improved with a GDP growth rate of 2.7 percent,² there are imbalances in trade and limited public investment. The Islamic Emirate has reduced women's labour force participation and maintains opaque economic policies, offering little clarity on budget expenditures.

The Economy as Driver of Politics

The year 2024 started with general elections in Bhutan, Bangladesh, Pakistan, and Sri Lanka, along with parliamentary elections in the Maldives and Sri Lanka. Bhutan and Sri Lanka saw the election of new regimes, which came to power on the back of criticisms of the erstwhile governments for economic mismanagement. In Bangladesh, increasing economic discontent and growing unemployment led to student protests and eventually the overthrow of Sheikh Hasina's government. Nonetheless, the new regimes, having inherited distressed economies, have limited space for political autonomy and radical policy shifts. In the Maldives, the Muizzu government, despite its parliamentary majority, is struggling with everyday governance due to debt repayments, depleting foreign reserves, and increasing import costs.

In July 2024, Nepal saw the formation of another coalition, with the Communist Party of Nepal (Unified Marxist-Leninist) forging an alliance with the Nepali Congress. Similarly, Pakistan's February elections saw a coalition formed by the Pakistan Muslim League-Nawaz (PML-N) and the Pakistan People's Party. These weak alliances of rival parties have impeded any potential long-term policy responses to their respective countries' economic woes. In Pakistan, this inability to govern has provided a new momentum to the opposition party—the Pakistan Tehreek-e-Insaf (PTI)—and its supporters, exacerbating the country's political uncertainty. Meanwhile, the Islamic Emirate solidified its power and completed three years at the helm in Afghanistan.

Agency Challenged?

Structural factors have impacted the agency of economically fragile South Asian countries, albeit selectively. The ongoing Russia-Ukraine war has caused economic hardships in the region, eventually leading to the toppling of the government in Bangladesh. Nepal and Sri Lanka are unable to stop Russia's recruitment of their nationals, reflecting their limited state capacities,

despite Sri Lanka's efforts to balance relations between the West and Russia. With a significant diaspora, working in the Middle East and sending remittances back home, South Asian countries are also worried of increasing tensions, despite their respective policies towards Israel and Palestine.³

New regimes in Bhutan, Sri Lanka, Nepal, and the Maldives have continued to work with India, regardless of their electoral rhetoric and ideological leanings. This has also contributed to increased connectivity with India across various sectors with subjectively little disruption. That said, countries have balanced their relations with China, despite the latter's slowing investments. For Pakistan, its relationship with China has taken a hit as the number of attacks on Chinese workers in the country increased this year. It has improved ties with Russia and has been trying to woo the United States (US). In Afghanistan, the Taliban are engaging with China, Russia, and the Central Asian countries on infrastructure and connectivity projects. Countries are also establishing de-facto relationships with the Taliban to protect their security interests as terror groups resurge in Afghanistan, giving Kabul more economic and political leverage.

In the past year, enduring economic challenges shaped South Asia's domestic politics and, to a certain extent, its external relations. Going forward, economics will continue to dictate the direction of the region. Recent developments in Syria and deepening crises in the Middle East can create new security challenges, especially with

terror threats intensifying and posing challenges to tourism.⁴ Donald Trump's victory and his potential escalation with China have also provoked uncertainty for the countries of the region.

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III

Global Issues

Warfare

New Tech and Old Attrition Tactics

Kartik Bommakanti

Three key trends in warfare were visible during the past year. First, the increasingly lethal use of drones. Second, the development of counter-unmanned systems to deal with the drone threats against mobile sea-based and land-based capabilities. Third, the enduring relevance of attrition and adaptation in ongoing conflicts.

Unmanned Warfare: A Menace on the Battlefield

The advent of unmanned aerial vehicles (UAVs) or drones has made the modern battlefield more lethal. In the ongoing Russia-Ukraine war, First Person View (FPV) drones and loitering munitions have proved lethally efficient, destroying a large number of Russian main battle tanks (MBTs)

from the T-series such as the T-90s and T-72s. Its production and manufacturing of tanks have taken a hit.

Likewise, the Russians have used Iranian-built Shahed-136 drones, which have wreaked havoc on Ukrainian forces. Yet Kyiv's use of drones has been very effective relative to Russia, with several thousand Ukrainian units deploying them on the frontlines. Significantly, these drones have been augmented by Artificial Intelligence (AI). Miniaturised Ukrainian UAVs have proved deadly by finding small open spaces into Russian tanks and detonating them. AI-enabled drones also reduce reliance on remote human piloting. Israel, too, has used drones extensively in its war against Hezbollah and Hamas.

Nevertheless, the Russians are fighting Ukraine through attrition, relying heavily on mass artillery strikes and drone attacks to target Ukrainian civilian infrastructure, whereas the Ukrainians have fought the Russians with precision weaponry and manoeuvre. Yet the challenge for both warring states has been defending against drones targeting armoured and infantry fighting vehicles, with unmanned aerial assaults taking a heavy toll on both sides. Consequently, territorial gains, especially by Russia, have been incremental rather than swift and dramatic. In response to the use of drones, Kyiv and Moscow are experimenting with counter-drone systems.

Counter-Unmanned Systems for Armoured Capabilities and Surface Vessels

To mitigate drone threats against their armoured forces, mobile artillery, and infantry, Russia has pursued temporary innovations and adaptations. Russian tanks have metallic shields also known as “turtle” tanks, to protect against incoming anti-tank guided weapons and highly miniaturised UAVs. These changes include anti-tank detection equipment mounted on the tanks which increases the tank’s weight. The Russians have set up an Electronic Warfare (EW) jamming capability atop

the tanks which are deployed on the battlefield. These are, nevertheless, temporary protective mechanisms.

Russia, alongside other countries such as India, is working on more durable and effective battlefield solutions to counter the drone threat they face. These include investments in laser and microwave weapons as well as more potent EW systems. Effective platforms, like the German-built Gepard self-propelled anti-aircraft gun (SPAAG), have demonstrated success in countering UAVs and loitering munitions. Deployed by Ukraine, the Gepard’s dual 35mm automatic cannons deliver a high firing rate, supported by an advanced fire control and radar capable of tracking small low Radar Cross Section (RCS) targets.

Similarly, surface vessels at sea that are vulnerable to aerial threats from UAVs and loitering munitions are being tackled with counter-unmanned systems, including rapid-fire guns, lasers, and microwave weapons are undergoing development. Beyond counter-drone capabilities, the ongoing wars between Russia and Ukraine and Israel-Hamas and the recently paused Israel-Hezbollah war, attritional warfare remains salient.

Attritional and Manoeuvre Warfare

While the war between Israel and Hezbollah has witnessed a delicate conclusion through a fragile ceasefire, the wars between Israel and Hamas, and Ukraine and Russia continue to rage. Attritional warfare has remained an enduring feature in these conflicts. Moscow has taken a gamble—that exhausting the Ukrainians will help secure victory, relying on attrition and mass offensives. These are longstanding hallmarks of Russian military strategy.

While pursuing attrition, Ukraine has resorted to manoeuvre warfare in a quest to not fight on Russian terms. Faced with Moscow's greater supply of manpower and firepower, Kyiv adjusted its operational strategy in August this year, exemplified by its offensive into Russia, which captured part of the Kursk region. Ukraine has also embraced mission command principles, emphasising centralised intent and decentralised execution. This approach mandates tactical and operational adaptability, guided by a common understanding among friendly forces, initiative and calculated risk-taking. Kyiv, on balance as opposed to its Russian adversary, has used its limited capabilities and their restricted employment with greater effectiveness on the battlefield.

Nevertheless, Ukraine's position is more precarious due to its dependence on military aid from the West, which has been both inadequate and inconsistent. The incoming Trump administration has expressed a desire to end the conflict, leaving Kyiv grappling with uncertainties and military failure or unfavourable outcomes. Further, Ukraine faces growing challenges in meeting its military recruitment targets.

Regardless of Kyiv's pursuit of attrition or manoeuvre, there is no escaping the requirement for capabilities in winning battles and meeting objectives. Despite inflicting blows against Hezbollah, the Israelis have settled for a ceasefire, unable to decisively eliminate the terrorist militia. The Hamas-Israel conflict persists, despite Hamas suffering substantial losses, but the Israelis will have more leeway in prosecuting operations against the terrorist group as the incoming Trump administration has shown greater willingness to support Israel's military operations and objectives in Gaza than the Biden Administration. All these conflicts will continue into 2025, before any substantive termination is achieved.

Trade

Much Ado About Nothing

Jhanvi Tripathi

The noise in policy circles created by Donald Trump's re-election has been a real distraction from what was overall a significant year for trade policy. The tariff threats are unsurprising given President Trump and his incoming administration's well-known trade stance. In the meantime, the past year saw some hits and misses, setting the stage for an interesting 2025.

Recovery and Growth

Global trade, which contracted by 3 percent in 2023, rebounded in 2024 and reached US\$33 trillion.¹ This recovery offset the US\$1-trillion

trade loss recorded after 2022, when trade fell from US\$32 trillion, according to UNCTAD data.²

Significantly, this growth was primarily driven by trade in services, and not goods. It reflects the impact of trade flow disruptions caused by prolonged and escalating conflicts in West Asia. While it did not bring trade to a standstill, International Monetary Fund (IMF) reporting shows that disruptions in the Red Sea trade route led to a 50-percent decline in trade during the first two months of 2024. The movement volumes fell from 4.29 million metric tons per seven-day moving average by the end of December 2023 to 2.01 million metric tons per seven days by early March 2024.³

Trade War 2.0: Tariffs vs Technologies

The Biden administration in the United States (US) made no serious efforts to reverse Trump-era trade policies, other than re-engaging on climate action and securing critical mineral supply chains. In the haste to de-risk supply chains from China, many countries underestimated China's efforts to reduce the impact of what it could only have seen as a global effort to cripple its economy. Chinese multinational corporations have steadily worked toward self-sufficiency. While trade growth in the country has slowed, it remains in a position of strength due to global reliance on its exports. Meanwhile, the country spent extensively on R&D making, especially the critical mineral and tech supply chains independent of US influence, even as the world focused on diversification.

Two major recent developments in China are poised to have wide-ranging impacts on the tech sector:

1. Fully domestically produced chips⁴ – In late 2023, Huawei, despite dealing with setbacks from being on the US entity list, launched the Kirin 9000S processor—a fully domestically produced semiconductor chip. From raw materials to the Intellectual Property (IP) for production technology, every aspect is controlled by Chinese companies. This makes China's electronics sector exceptionally secure from external shocks and may also be influenced by its plans for Taiwan.
2. In early December 2024, China announced export curbs on gallium, germanium, and antimony, specifically targeting the US.⁵ However, this implicates all countries buying US-manufactured chips, as semiconductor chip prices are expected to rise because of these curbs. Ostensibly, China is redirecting these resources to its domestic manufacturers, encouraging a shift away from reliance on US-manufactured chips. This is an economically viable option for Chinese companies, as domestically produced chips further reduce costs, making them more competitive.

The emerging Trade War 2.0 is therefore not just about tariffs but control of new technologies.

BRICS Currency Vs Currencies

The expansion of BRICS and its decided focus on finding alternatives to the SWIFT system for trade settlements has caused confusion and concern. To clarify three key points: First, trading in local currencies is not a new practice and is a commonly used tool for transactions with countries under US sanctions. Second, the idea of a common currency for BRICS is far-fetched, given the lived example of the Euro crisis and with neither geography nor economic development levels binding the group. Third, alternatives to the SWIFT system are necessary to reduce vulnerabilities in the international financial architecture, which exposes Global South countries to risks created by fiscal measures taken in the Global North.

Instead of focusing on statements from specific BRICS members on their individual ambitions, it may be better to focus on what the group is doing and is practically able to deliver.

Retrospect

The year started with a disappointing 13th Ministerial Conference (MC13) of the World Trade Organization (WTO). Since 2020, the WTO Appellate Body has had no sitting member, and until this glaring problem is resolved, the WTO will remain more of a rule keeper than a protector of multilateral order. In the meantime, while trade recovery is a positive sign, the statistics must be understood with caution. The growing uncertainty in West Asia is going to make trade extremely costly and risky, in addition to the upcoming US tariffs. 2025 is also the final year of adjustment before the implementation of the Carbon Border Adjustment Mechanism (CBAM).

Connectivity

Renewal, Resilience, and Reach

Prithvi Gupta

In the aftermath of the COVID-19 pandemic, global connectivity and cooperation within the international community became an even more urgent imperative. The supply chain shocks that followed thereafter—the breakthroughs in generative AI, conflicts in the Middle East and Europe, and the Suez and Panama canal blockages, among other disruptions—necessitated the development of resilient, reliable, and responsive regional and global value chain networks. Another emerging facet of international connectivity cooperation is the geopolitical tussle surrounding infrastructure development and trade between the

United States (US) and China and their respective allies.

The corridors that emerged in 2024—the G7's Partnership for Global Investment and Infrastructure (PGI), India's foreign assistance in the neighbourhood and the Indian Ocean, Japan's Blue Dot Network and Southeast Asian development outreach, and the various Middle Eastern corridors—are part of a larger effort to counter China's Belt and Road Initiative (BRI).

In 2024, the BRI evolved as Beijing attempted to digitise and green the initiative; there is a connectivity corridor in every corner, and the resilience imperative of the global value chain network has never had more momentum than today.

Greening the BRI

Any conversation on connectivity cooperation is incomplete without the BRI. The BRI's economic engagement in 2024 amounts to US\$1 trillion across 140 countries; China also emerged as the top trading partner to over 100 countries in 2024.¹ Yet, a deeper analysis reveals that structural changes to the BRI began in 2024.

As Beijing deals with an economic downturn, a collapsing real-estate market, and massive debt burdens, it is exchanging large-scale high-risk economically extensive BRI infrastructure projects for small-scale green energy and critical and emerging technologies projects such as solar

hydel, wind, cloud computing, 5G, subsea cables, and electrical vehicles. In 2024, 'green' and 'digital' emerged as key themes in the new phase of BRI development. Green and tech BRI projects are projected to cross over US\$13 billion in 2024, with green energy and technology investments driving the BRI in 2024.² Of total Chinese BRI economic engagements in 2024, 34.4 percent were in the green energy and tech sectors, at US\$12.34 billion between January 2024 and November 2024—a significant increase from previous years since its inception in 2013, where green investments accounted for hardly 15 percent on average.³

A Corridor in Every Corner

The BRI is responsible for underlining the geopolitical imperative of connectivity cooperation in the broader international milieu. 2024 saw the consolidation of Western connectivity initiatives under the PGI at the G7 Apulia Summit⁴ and India and Japan's development outreach in their respective neighbourhoods—all to counter the BRI, develop resilient value chains, secure Critical Resource Minerals, and bolster geopolitical and geoeconomic influence.

In 2024, connectivity cooperation acquired undertones of the emerging multipolar order. The BRICS+ nations pledged to develop and operationalise the International North South Transport Corridor; at the St. Petersburg Economic Forum in 2024, Russia wooed international investors for developing the Northern Sea Route; Armenia pitched a “crossroads of peace” for peace-through-development in the Southern Caucasus, and Central Asian countries leveraged European investments against the existing BRI cooperation framework in their countries; and the G20 project, the India Middle East Economic Corridor (IMEC), began making headwinds as India, the UAE, and Italy step up their cooperation to materialise the IMEC vision. Additionally, the Ankara-led Development Road to Europe and China’s BRI in the Afghan Wakhan Corridor are geostrategic corridors that will have far-reaching geoeconomic and geopolitical implications. Besides geopolitical considerations, the common directive tying these corridors is maintaining a conducive external environment for continued domestic economic growth.

The Resilience Imperative

In 2024, resilience, agility, and reliability of the global value chain network was tested to its limits. Iran’s escalating belligerence in the Middle East amid the Israel-Hamas conflict, the continuing Russian aggression in Ukraine, and unprecedented climate shocks to critical infrastructure revealed gaps in food and energy security strategies in developing and least-developed economies. These structural shocks also exacerbated inflationary pressures and subsequently increased the focus of central banks on global supply-chain operations. National governments responded by furthering the development of connectivity corridors signed in 2023 and proposing more corridors with like-minded partners for increased interdependence, resilience, reliability, and agility in global and regional value chain systems. Thus, there were significant developments in the IMEC, INSTC, Lobito Corridor, Middle Corridor, the Development Road, and the BRI owing to this resilience imperative in the global trade and value chains.

In 2024, connectivity cooperation within the international community reflected the intertwining of geopolitics, economic growth, and trade. Trade corridors emerged as an established

domain of geopolitical contestation, and the developments in the domain augur global rifts, geopolitical alignments, and the overarching multipolar order.



Geotech

Disruption and Fragmentation

Sameer Patil

Technological advancements continued to shape the contours of geopolitical competition in 2024. While a number of dimensions shape these geotech dynamics, the competition between the United States (US) and China has emerged as the driving factor. Three key trends around semiconductors, cyberspace, and global artificial intelligence (AI) governance emerged in the past year.

Semiconductors Take Centre Stage

Countries worldwide are scrambling to secure their semiconductor supply chains. The COVID-19 pandemic accelerated these efforts, which gained further momentum in 2024. The Quad leaders, at their Delaware Summit in September 2024, agreed to establish the semiconductor supply chain contingency network.¹ Meanwhile, the US's CHIPS and Science Act, which seeks to increase the domestic supply of semiconductors, showcased American efforts to wean production from China.²

The Biden administration claimed that, in the last two years, it mobilised investments worth US\$400 billion, with companies like Taiwan Semiconductor Manufacturing Company (TSMC), the world's largest chip manufacturer, agreeing to build several plants in the US.³ In 2024, it announced plans for a third factory in Arizona, raising its total investment in the US to US\$40 billion.

The US also extended its crackdown by curtailing China's access to advanced memory chips and chipmaking tools. The latest restrictions, announced in December 2024, target two dozen semiconductor companies and over 100 chipmaking tool makers.⁴ China, too, is not watching quietly. In the past year, it

ramped up efforts to achieve self-sufficiency in the semiconductor sector by opening additional fabs and stockpiling microchips from the US in anticipation of heavy tariffs promised by President-elect Donald Trump.

However, surging demand for semiconductors is also driving the expansion of TSMC, expanding its presence worldwide and diversifying global operations. In the past year, besides the US plant, it opened its first plant in Japan, broke ground for the first plant in Europe (in Germany), and announced plans to build 10 more plants in 2025.⁵ These developments will fundamentally affect the semiconductor landscape in the coming years.

Cyberspace Stability Remains in Flux

In 2024, cyberspace stability remained precarious as states accelerated offensive cybercampaigns to destabilise their adversaries. Earlier in the year, the US and other Five Eyes allies warned about the actions of China's Volt Typhoon threat actor for targeting their critical infrastructure facilities.⁶ Similarly, conflicts in Ukraine and the Middle East underscored the importance of cyber operations in supporting conventional battlefield campaigns. For instance, since Hamas's October 2023 raid, Israel has witnessed a doubling of cyberattacks targeting its government and military computer networks as well as critical infrastructure.⁷

Supply chain security became even more imperative, with incidents like the CrowdStrike outage of July 2024 and the simultaneous explosion of Hezbollah's pagers and walkie-talkies in September 2024 in Lebanon. The CrowdStrike outage, which occurred due to a faulty software update, was possibly the largest IT outage in history, affecting over 8.5 million Windows

operating system devices.⁸ The Hezbollah pagers case demonstrated the possibility of the weaponisation of supply chains, as the devices were reportedly rigged at the production level. These two incidents amplified concerns over supply chain integrity, mainly due to their global reach and opaque nature.

Yet, it was not all doom and gloom in cyberspace. In August 2024, the member states of the United Nations (UN) agreed on a new cybercrime convention to help tackle the growing menace of cybercrime.⁹ The convention is expected to be adopted by the UN General Assembly in the coming weeks. While many have expressed scepticism, it is indeed a landmark achievement at a time when polarisation in cyberspace, reflective of broader geopolitical divisions, has stymied global cooperation.¹⁰

Fragmented AI Governance Landscape

The global AI governance landscape has continued to be fragmented, with key geographies proceeding on their own paths and collaborating with like-minded partners. In August 2024, the European Union's AI Act came into force, making it the first to implement a comprehensive regulatory framework on this key technology.¹¹ At the same time, the Council of Europe joined hands with the US, United Kingdom, and Israel to sign the first international treaty focused on AI governance.¹² Meanwhile, China maintained its momentum by releasing new draft regulations on generative AI in May that outlined several security measures for generative AI services.¹³

One key document that sought to unite these competing states was the Global Digital Compact, adopted at the UN Summit of the Future in September 2024.¹⁴ The aim is to foster

a more open global conversation on digital and AI governance.¹⁵ However, tech companies continued to push the boundaries of AI innovation across several domains with heavy investments in R&D and practical applications. Their approach reflected a dominant trend of integrating AI into everyday applications and enhancing productivity and user experience.

Conclusion

As conflicts and power struggles continue to rage, technology will remain an essential subtext for these rivalries. This will define the geotech dynamics in 2025. President Trump's impending return to the White House will also likely reshape the global tech landscape and US policies.

Development Agenda

The Global South Takes Centre Stage

Swati Prabhu

2024 was an important year for the global development landscape. From the multiple crises in Ukraine, Gaza, and various parts of Africa, the challenges associated with the Sustainable Development Goals (SDGs), and elections in almost every geography, the year witnessed the global repercussions of a tightened energy market; rising prices of food, fertiliser, and fuel; and dismal financing avenues for low-income countries to meet their SDG targets. In this context, partnerships remain an important cog in the development wheel for both the developed and developing worlds.

The Critical Role of Partnerships for Climate Finance

The failure of multilateralism is becoming increasingly evident. The world is struggling to keep up with conflicts and forced displacement of vulnerable communities. Partnerships are vital for addressing the key issues faced by the developing world. For instance, despite the trebling of climate finance, from US\$100 billion to US\$300 billion during the COP29 in Baku in November 2024, it is still insufficient to meet the total low-carbon needs of developing nations.¹

The resultant outrage from least developed countries (LDCs) is pertinent. After all, they have low wherewithal to access climate finance and they are unable to effectively adapt to the consequences of extreme-weather disasters.²

Both developed and developing nations must recognise their common responsibility to counter climate change. In this context, partnerships, especially in the form of official development assistance (ODA), are among the key drivers of change for sustainable climate finance in the long run.³

Rise of the Global South for Sustainable Development

There has been a visible departure from traditional development partnerships. Countries have become mindful of incorporating both security and developmental narratives, be it part of trade agreements like Trade and Economic Partnership Agreement (TEPA) between India-European Free Trade Association (EFTA) states or building cooperative frameworks like the BRICS (Brazil,

Russia, India, China, South Africa), the IPEF (Indo-Pacific Economic Framework), or the I2U2 (India, Israel, United Arab Emirates, and United States). Here, we see the rise of Southern-driven actors such as India, China, Brazil, and South Africa, crafting a conversation on inclusivity and equity towards reforming existing global norms.

India, for instance, has been making strides in this regard. With the launch of the Voice of the Global South Summit during its 2023 G20 Presidency, India is continuing to offer low-cost developmental solutions as a viable alternative to the Western donor-led model. Though clashing geopolitical interests in the Global South does complicate the development landscape, particularly through China's Belt and Road Initiative (BRI) of infrastructural expansion and outreach, Beijing is now pivoting towards 'sustainable and greener' projects.⁴ The stated aim is to make BRI an engine of common development for all countries by working for the global public good, as highlighted by Chinese Foreign Minister Wang Yi in March 2024.⁵

Reshaping Economic Diplomacy and Development Gameplays

Economic diplomacy is gradually taking the shape of not just development partnerships but also trade alliances. For instance, India is revamping its economic diplomacy by removing trade barriers and launching new frontiers to boost economic corridors. India is now ready to dive into the shifting currents of international markets through Free Trade Agreements (FTAs) with Mauritius in 2021, with the United Arab Emirates and Australia in 2022, and TEPA in 2024. Another addition is the India-Middle East-Europe Economic Corridor (IMEC) signed during India's G20 presidency. Bolstering economic partnerships through faster

regional connectivity, securing movement of goods, de-risking supply chains, lowering the overall logistic costs, and gaining the confidence of like-minded partners like the European Union (EU) are some of the key drivers of IMEC. The IMEC is also linked with the Brussels' Global Gateway programme. The European Commission under Ursula von der Leyen can realise its own development agenda by fostering deeper ties with the Global South.⁶ However, the multiple crises have somewhat thwarted these development gameplays, and financing the initiative is a bottleneck.

In 2024, development gained centre stage, but challenges persist. With the rapid evolution of the Global South, coupled with the restructuring of diplomacy, partnerships have emerged as a critical driver that will have long-term and profound impacts in the coming year.

Climate Crisis

Stubborn Inequities in Access to Finance and Tech

Aparna Roy

In 2024, the global community grappled with the realities of climate change while making notable strides in addressing its multifaceted challenges. Seminal developments, such as the operationalisation of the Loss and Damage Fund at COP28 and the increased deployment of artificial intelligence for climate solutions, highlighted the urgency for innovative approaches. However, these advancements also exposed persistent inequities in funding access and technological integration, particularly for vulnerable regions in the Global South.

Events of the past year also underscored the critical need for a recalibrated global response to bridge adaptation gaps and ensure equitable progress. In this evolving landscape, India continued to assert its leadership, driving climate finance discussions at the G20 and showing resilience in the face of mounting climate risks. This chapter examines three defining trends that shaped climate action in 2024, charting pathways for inclusive and transformative solutions.

Climate Finance: From Pledges to Delivery

The conversation on climate finance in 2024 both achieved progress and met with roadblocks. The commitment made at COP28 to establish a Loss and Damage Fund finally resulted in initial steps towards operationalisation, with contributions surpassing US\$2 billion globally. Notable contributions included an additional US\$500 million from Germany and US\$250 million from the United Arab Emirates. However, these contributions are still only a fraction of the estimated US\$200–400 billion annual requirement to address climate-induced losses and damages by 2030.

Despite these pledges, there are stark inequities in disbursements. The Climate Policy Initiative's 2024 report highlighted that only 17 percent of committed funds reached developing nations this year, emphasising barriers in accessibility and governance frameworks. Countries in South Asia and Sub-Saharan Africa, among the most vulnerable, received less than 5 percent of their required adaptation financing.

The delayed rollout of adaptation funds has exacerbated vulnerabilities. For instance, in South Asia, climate change is projected to cost US\$518 billion by 2050, and the region is on-track to experience a median income loss of 22 percent by mid-century. India, despite hosting dialogues on green financing at the G20 Summit, reported a gap of nearly US\$25 billion in its annual adaptation financing requirements. These challenges have reignited calls for reforming multilateral development banks and innovative financing tools such as sovereign green bonds to mobilise adequate resources.

AI: A Double-Edged Sword

2024 marked a breakthrough in leveraging AI for climate mitigation and adaptation. AI-driven climate models improved predictive capabilities for extreme weather events, allowing countries like the Philippines and Indonesia to better prepare for typhoons, reducing human and economic losses by an estimated 15 percent compared to previous years. AI applications in optimising renewable energy grids, particularly in Africa and Southeast Asia, reduced grid inefficiencies by 20 percent.

However, AI's deployment has not been devoid of challenges. The energy-intensive nature of AI technologies has raised concerns about its carbon footprint. A report by the International Energy Agency revealed that data centres powering AI solutions accounted for nearly 2 percent of global electricity consumption in 2024; the figure is projected to rise sharply.

Additionally, the accessibility of AI technologies remains a challenge for the Global South. High costs and inadequate digital infrastructure have limited their integration into climate policies in many developing nations. For instance, AI-based tools for monitoring deforestation were deployed successfully in Brazil but remained inaccessible to Congo Basin nations due to resource constraints. The disparity highlights the need for international cooperation in sharing AI tools and technology transfer to ensure equitable access.

Regional Disparities in Adaptation and Resilience

The year 2024 underscored the widening gap in climate adaptation efforts between the Global North and Global South. Wealthy nations ramped up investments in climate-resilient infrastructure and spent US\$180 billion collectively, as low-

income countries struggled to secure even a fraction of their required funding.

Africa, despite contributing less than 4 percent of global greenhouse gas emissions, bore the brunt of climate impacts, with droughts in East Africa displacing over 1.2 million people this year. Meanwhile, Europe allocated significant resources to buffer its agriculture sector against heatwaves, reducing crop losses by 25 percent. This disparity highlights the stark inequities in global climate adaptation priorities.

India's response to Cyclone Biparjoy demonstrated both progress and challenges in disaster resilience. Early warning systems and evacuation protocols saved at least 30,000 lives, but post-disaster rehabilitation lagged due to inadequate financial and institutional capacity. The country's experience mirrored broader regional trends: South Asia's adaptation deficit has been exacerbated by inadequate international support and weak domestic governance.

Efforts to bridge these gaps were evident at COP29 in Baku, where developing nations rallied for the expansion of the Global Adaptation Fund. A pledge of US\$5 billion was made, but without systemic reforms to ease access, these funds risk being underutilised.

A Call for Equitable Solutions

As 2024 draws to a close, the lessons from these trends are clear. First, the international community must transition from rhetoric to action in climate finance, ensuring that pledged funds are delivered and accessible to those most in need. Second, while AI offers transformative potential, its deployment must be inclusive, accompanied by regulations to mitigate its environmental costs. Finally, addressing regional disparities in climate adaptation requires a recalibration of global priorities, with the Global North taking greater responsibility in supporting vulnerable nations.

The journey towards meaningful climate action in 2024 has been defined by both progress and persistent challenges. As we look ahead, the imperative remains clear: to pursue innovative and equitable solutions that place the needs of the most vulnerable at the centre of climate governance. The stakes have never been higher, but neither has the potential for collective action to redefine the trajectory of our planet's future.

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Health

Uncertainty and Conflicts Take a Toll

Lakshmy Ramakrishnan and Oommen C Kurian

2024 was a year of conflicts and uncertainty in global health alongside rapid advances in science and technology. RNA, which had previously been recognised by the Nobel Committee for its role in gene regulation and in vaccines against COVID-19, once again took centre stage. The Nobel Prize in Physiology or Medicine was awarded for the discovery of microRNA, which has profound implications for the development of therapies. While such

breakthroughs showcased innovation, governance hurdles and geopolitical tensions persisted. Amid uncertainty, conflicts, climate-health intersections, and rapid technological advancements, the global health landscape demands urgent and coordinated responses. This article explores three pressing themes of 2024: the uncertainty in global health governance, the balancing act of regulating rapid technological progress, and the impact of conflicts on health.

Uncertainty in Global Healthcare Governance

Global health governance in 2024 oscillated between progress and stagnation. As changes to the international health regulations continued, negotiations on the pandemic treaty are continuing over the contentious Pathogen Access and Benefit-Sharing mechanism. This issue, which is crucial to fair access to health technologies, puts LMICs' demand for health sovereignty against the interests of pharmaceutical giants, and the resulting impasse hampers multilateralism at a time when global solidarity is most needed.

This uncertainty extends to antimicrobial resistance (AMR), which continues to pose a significant public health threat. Addressing AMR requires robust global monitoring, equitable funding, and cooperation. The weakening of global health structures jeopardises these efforts.

Combined with this is the unpredictability triggered by geopolitical conflicts and Donald Trump's return to White House, which raises questions about the United States' (US) leadership role in global health. It remains to be seen whether

other contenders—China and philanthropies—will be able to pick up the slack in the case of another American withdrawal from WHO and other multilateral fora.

The year also witnessed the Africa Centres for Disease Control and Prevention (Africa CDC) playing a more proactive role, declaring mpox as a Public Health Emergency of Continental Security. With the spread of avian influenza, the Marburg virus, and a mysterious fever in the Democratic Republic of Congo, the need for global disease preparedness backed by a strong global health governance system that protects the interests of the Global South remains.

Regulatory Challenges Amid Rapid Technological Advancements

Biotechnology and artificial intelligence (AI) are revolutionising global health, offering potential solutions for diagnostics, vaccines, and therapeutics. Government-led platforms like India's E-Sanjeevani, which has facilitated over 300 million remote patient consultations till date, show how digital health tools can improve accessibility, while the Cancer Moonshot initiative under Quad shows global progress in the fight against non-communicable diseases.

Concomitantly, the regulatory frameworks for emerging health technologies have struggled to keep pace with the breakneck speed of innovation. Synthetic biology, biomanufacturing, and the integration of AI into healthcare pose important challenges to governance, particularly in the context of data protection, algorithmic prejudices, and the risk of abuse. Emerging threats such as cyberbiosecurity violations and bioterrorism emphasise the need for robust protective measures to safeguard the bioeconomy and critical supply chains. The rapid pace of technological change threatens to increase global inequality if benefits remain concentrated in high-income countries. Agile regulatory frameworks need to cover not only safety and effectiveness but also the geopolitical dynamics of biotechnology, as countries are increasingly exploiting these frameworks for economic and strategic benefits.

Impact of Conflict on Health


Armed conflicts in Europe and West Asia have become a death knell for global public health. The war fatigue is accompanied by huge casualties, civilian deaths, food insecurity, mounting toll of infectious diseases, and the displacement of tens

of thousands of people. The weaponisation of healthcare has materialised in the form of attacks on medical personnel, hospitals, and ambulances. Restricted access to critical supply chains have undermined the practice of neutrality over health and medicine during these conflicts. Health systems are experiencing abysmal conditions as a result of the ongoing violence.

Multilateral agencies stepped up polio immunisation drives after outbreaks were reported in Gaza as a result of targeted attacks on water supply and wastewater disposal systems. However, “humanitarian corridors” or routes of safe passage for parents to bring their children for immunisation have been limited.

Current conflicts have geopolitical consequences for global health funding, with multilateral funding agencies making significant contributions to healthcare in Ukraine. Further, increased military spending, such as the US response to the Israel-Hamas conflict, has diverted funds away from global health.

The Trump factor and armed conflicts across the globe loom over a global health landscape that is characterised by unpredictability. Tardy progress of negotiations over a pandemic treaty, rapid technological advancements that are simplifying healthcare but also posing risks from abuse and misuse, and collapsing healthcare

systems in conflict-ridden places demand diplomatic intervention. Safeguarding health may be a vital solution to restoring peace, and global health diplomacy may be the most effective way to do so. 

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Connectivity

Renewal, Resilience, and Reach

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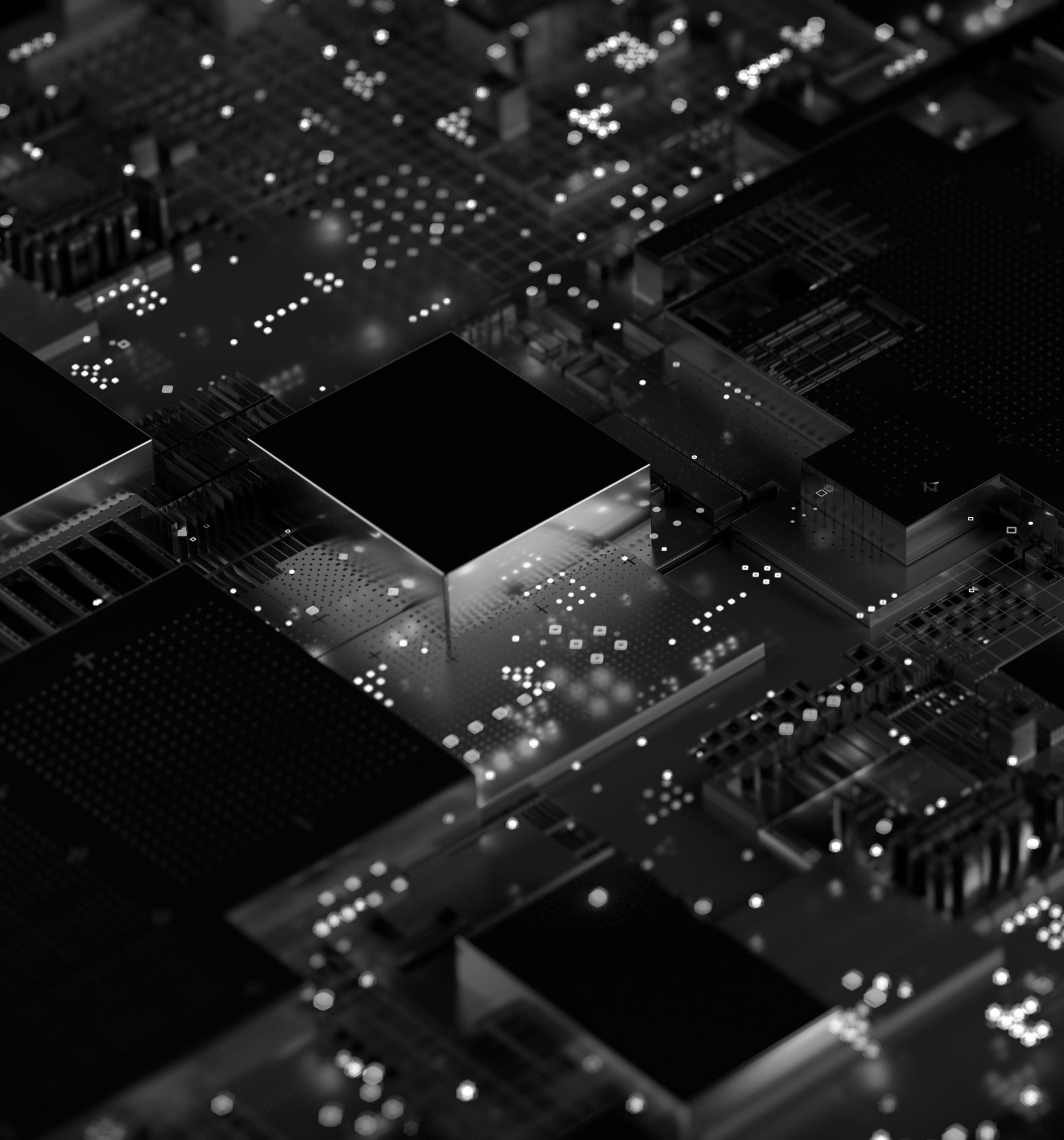
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The Global South Takes Centre Stage

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