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Strategic Mirage: Why America's India Bet May Not Pay Off

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SYNOPSIS

Although Modi's visit to Washington early in Trump's second term highlights the importance of US-India strategic ties, the relationship faces inherent limitations. Despite their shared concerns, India's deep economic links with China and commitment to strategic autonomy, among other issues, cast doubts about its reliability as a US partner in potential China-related conflicts.

COMMENTARY

As India and the United States forge closer ties under their respective leaders' new terms, an important question arises: Can India, the world's most populous country, serve as America's strategic counterweight to China when it remains deeply dependent on Chinese supply chains and is steadfastly committed to its doctrine of strategic autonomy? The fundamental contradiction this implies lies at the heart of Washington's deepening engagement with New Delhi.

Modi and Trump: Good Bedfellows?

The timing of Prime Minister Narendra Modi's visit to the United States on 12-13 February as President Donald Trump settled into his second term signals the strategic importance Washington places on its relationship with India. This prioritisation reflects a broader Western pivot toward India, as further evidenced by the European Commission's planned visit to India and the latter's ongoing free trade negotiations with the UK and EU. However, beneath this flurry of diplomatic activity lies a complex web of aligned interests and mismatched expectations that could challenge the relationship's long-term trajectory.

The personal dynamic between Modi and Trump, both serving unprecedented terms

in their respective democracies, appears to have created fertile ground for cooperation. Their shared worldview, characterised by economic nationalism, scepticism of liberal media, and concerns about China and radical Islam, provides a foundation for mutual understanding. This alignment extends to their bases, with Indian public opinion favouring Trump's second term.

However, the relationship faces immediate challenges in trade and immigration. Trump's characterisation of India as a "tariff king" and criticism of its trade surplus with the US implies the need to manage the relationship carefully. Modi, operating from a position of relative domestic weakness following a less-than-decisive electoral victory and facing economic headwinds, appears ready to make concessions through increased purchases of American energy and defence products. This pragmatic approach reflects India's need to maintain stable relations with its largest export market while navigating domestic political sensitivities.

The immigration issue presents a more nuanced challenge. While both countries acknowledge the need to address illegal migration, particularly given India's position as the third-largest source of unauthorised immigrants to the US, the question of legal migration through H-1B visas remains contentious.

Trump's "America First" agenda views these visas through the lens of protecting American tech jobs – a position he demonstrated with restrictions during his first term. Modi, recognising this vulnerability for India's tech sector, appears ready to offer concessions on illegal migration while seeking to preserve this vital pathway for Indian professionals.

The evolution of work patterns, including the growth of global capability centres in India and nearshoring solutions in Canada and Latin America, may ultimately create a compromise where both leaders can claim victory – Trump by appearing tough on immigration while Modi maintains critical access to the US market and opportunities for Indian talent.

India – Reliable Partner in the US-China Competition?

The strategic dimension of the India-US relationship, particularly regarding China, possesses both opportunities and limitations. The Biden administration's China hawks, many of whom are also strong supporters of India, see New Delhi as a crucial partner in their Indo-Pacific strategy.

Recent developments, such as the advancement of the Quad framework and the new ten-year defence cooperation agreement between the two countries, which will be signed later this year, suggest growing strategic alignment. India's emerging prominence in technology sectors, particularly chip design and digital infrastructure, further strengthens its appeal as a partner in the US-China tech competition.

However, examining the economic realities reveals a fundamental contradiction in viewing India as an alternative to China. India's manufacturing limitations represent opportunities for transformation rather than insurmountable barriers to challenging China's dominance. While significant integration with Chinese supply chains exists in

pharmaceuticals and solar power, strategic diversification functions as a gradual process.

Companies like Apple demonstrate this through parallel development – establishing manufacturing in India while maintaining Chinese operations, creating redundancy that addresses both economic and security imperatives. Security considerations increasingly outweigh pure economic calculations in diversification decisions, with companies and nations accepting higher costs to reduce vulnerability in critical sectors.

India's improving infrastructure, manufacturing policy reforms (especially Production-Linked Incentives), growing technical workforce, and alignment with Western security interests collectively strengthen its potential as a diversification partner. The fundamental question isn't whether India currently matches China's capabilities, but whether it offers a credible pathway addressing both economic efficiency and security concerns – particularly as geopolitical tensions intensify throughout the Indo-Pacific.

India's Relations With the West's Adversaries

Strategic autonomy, India's foundational foreign policy principle, ensures independence from any power bloc – maintaining Russian defence ties, deepening US cooperation, and engaging China economically despite tensions. This creates an inherent paradox in US-India relations: the very independence that makes India attractive to Washington guarantees it will never fully align with American objectives in Asia.

Furthermore, India's relationships with countries like Russia and Iran create natural limits to the depth of technological cooperation possible with Western partners. These relationships, combined with India's doctrine of strategic autonomy, raise questions about India's reliability as a partner in potential conflicts, particularly regarding Taiwan. The ambiguity could become increasingly problematic as US-China tensions escalate.

The strategic thinking behind this early summit between the US and India appears focused on short-term confidence-building rather than addressing these fundamental contradictions. Cultivating India as a partner for the US serves multiple objectives: creating a potential counterweight to China, securing a growing market for American goods, and strengthening democratic alliances in Asia. For India, closer ties with the US offer technological access, defence cooperation, and diplomatic support in regional affairs.

However, the long-term sustainability of this partnership requires both sides to reconcile their expectations with reality. The United States must accept that India's strategic autonomy doctrine and economic ties with China will limit the extent of their alignment. Similarly, India must balance its desire for American technology and support with its broader strategic interests and domestic political constraints.

Conclusion

Looking ahead, several factors will likely shape the trajectory of the US-India relationship. First, how US-China relations evolve will influence India's calculus

regarding how closely it should align with Washington. Second, India's success in building domestic manufacturing capacity and reducing dependence on Chinese supply chains will determine its credibility as an alternative partner. Finally, the ability of both India and the US to manage immediate irritants in trade and immigration while maintaining focus on longer-term strategic alignment will be crucial.

The implications of this strategic relationship extend beyond bilateral ties to the broader international order. As the world potentially moves toward technological and economic competition, India's position as a major democratic power with significant ties to both East and West makes it a crucial swing state. How New Delhi navigates this position, and how Washington accommodates India's unique circumstances, will significantly influence the emerging global architecture.

The success of Modi's visit to the US and the broader US-India partnership will ultimately depend on both sides' ability to maintain realistic expectations while building on areas of genuine alignment. The relationship's potential remains significant, but realising it requires acknowledging and working within its inherent limitations rather than pursuing unrealistic visions of complete strategic alignment.

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