

India US Strategic Trajectory: Two to Tango?

Introduction: Relationship Status

The Indo US trajectory is traversing an exceedingly difficult path under TRUMP 2.0 since the advent of tariff wars initiated by the President of the United States. From Aug 2025, a punitive 50 per cent tariff on a range of goods from gems and jewellery to Industrial Chemicals has been imposed on Indian exports to the US due to India's purchase of Russian oil. This economic punishment is likely to have an adverse impact on the Indian exports to US. US goods and services trade with India in 2024 totalled an estimated USD 212.3 bn¹ (with exports USD 87.3 bn and imports USD 41.5 bn). The details are follows:



Photo by Brendan Smialowski / Agence France-Presse

Trade	Total
Goods Trade (Export plus Import)	USD128.9 bn
Export	USD87.3 bn
Import	USD 41.5 bn
Services Trade (Export plus Import)	USD 83.4 bn
Export	USD 41.6 bn
Import	USD 41.8 bn
Total Indo-US Trade in 2024	USD 212.3 bn

Since India's independence, ties with the United States have weathered from Cold War era distrust and estrangement over India's nuclear program. Relations have warmed in recent years and strengthened across a range of economic and political areas. The last two decades saw a surge in the bonhomie between the two democracies with converging geopolitical interests resulting in special strategic fervour. The relationship was considered to be the key to US strategic presence in the Indo Pacific.

The recent actions of Trump administration have thus put enormous strain on the bilateral relations. It's not just the economic realm; for India, the geopolitical context of these trade tensions² is equally critical. The United States (US) remained notably distant in its response to the heightened military escalation between India and Pakistan in May 2025. Its reluctance even to express support for India's attribution of Pakistan's role for the terrorist attack at Pahalgam created a sense of abandonment in New Delhi. This has sparked concerns about the reliability of the US as a strategic partner. India's perception of growing US rapprochement with Pakistan—including renewed trade talks and the twin visits of Asim Munir to the White House—further clouds Washington's South Asia policy.

Geopolitical Landscape: 2025

A world shaped for decades by globalisation and geoeconomics has given way to one grounded in geopolitical risk³ and protectionism. The geopolitical landscape of 2025 is coloured with regional conflicts, trade protectionism and shifting alliances between various countries. The alliances are based on real politics and national interests reflecting outright selfishness in the post-COVID era. The power struggles between the major powers have made the scenario even more complex making global cooperation both critical and urgent in addressing international challenges. The snapshot of the contours of global underpinnings have been highlighted in the figure as given below:

India - US Tango: Interests or Illusions



Regional Conflicts, Trade Protectionism, Shifting Alliances

Makes Global Cooperation More Complex & Critical

Geopolitical Landscape: 2025 (Compiled by the Author)

The future of US-India relations is currently marked by increased tensions and uncertainty. This has been driven by recent tariffs, divergent strategic preferences, and domestic political compulsions in both countries. Friction stems both the countries stems from various choices like India's close ties with Russia, resistance to US positions on Pakistan and Iran, and India's economic policies which are aimed at boosting the domestic manufacturing. The absence of a strong shared stance⁴ on China has also lessened strategic convergence, while personal and political factors such as perceived slights and the domestic optics of the relationship have made compromise harder. India's situation today highlights a larger lesson in statecraft: reliance on a single strategic partner can be fragile and insufficient.

Despite these challenges, it retains strong institutional underpinnings and resilient people-to-people links.⁵ The relationship is deeply institutionalised through longstanding cooperation in technology, defence, people-to-people contacts (notably the 4.8 million-strong Indian diaspora in the US), and shared democratic values. The

recent statement of Commerce Minister Piyush Goyal on the hope of concluding the bilateral Trade Agreement with the US by Nov alludes to these deep underlying ties between the two nations. The India–US relationship can advance only on the basis of mutual respect and strategic autonomy central to country's interests as it 'takes two to tango'. Institutional and social ties may act as shock absorbers, but ongoing friction will require persistent diplomatic management from both the sides.

Traversing the Landscape: India's Options

Maintaining strategic autonomy through a multi-alignment foreign policy will facilitate India's progress towards achieving its interests. This means balancing relations with major powers like the US, China, and Russia without binding itself to any one power. It will also provide India flexibility to meet its growing energy, security, and technological demands. The country since independence has always shown resilience



Photo Source: bbc.com

to global pressures⁶ giving primacy to her concerns without exclusively binding itself to any power bloc and should continue to demonstrate this resolve. India and Russia maintain deep, time-tested strategic ties. It should be reinforced further for strategic balancing. With China,⁷ India's relationship remains complex, though the recent meeting between Prime Minister Modi and President Xi at the Shanghai Cooperation Organisation summit signals a willingness to pursue dialogue. This signals willingness for dialogue to resolve divergent issues and should be pursued further with due pragmatism. The idea of economic diplomacy⁸ has emerged as a key characteristic of India's impact in the current geopolitical environment. India, as one of the fastest-growing markets fuelled by international investment and domestic consumption, must leverage its economic strength in its diplomatic dealings with confidence.

As Kautilya reminds us, a true *Mitra* (ally) is one who facilitates growth and prosperity. The Western Powers must accept the changing geopolitical order and shun the arrogance of Global North supremacy for mutual growth and prosperity. The recent statement of Peter Navarro about 'Brahmin Profiteering' is indicative of misplaced understanding, filled with disrespect and poor demonstration of diplomacy. India should further diversify its defence and technological partnerships, hedging against future unpredictability of US policy. This can be done as per the government policy on supporting domestic industries and reinforcing international trade links. India's strategic priorities should remain focused on strategic autonomy, securing economic interests, managing security and championing multipolarity.

Endnotes

¹ Office of the United States Trade Representative. *Executive Office of the President*, accessed 18 Sep 2025. <https://ustr.gov>.

² Ishal Zehra, "India–US Relations and Cost of Strategic Autonomy," *Daily Sabah*, August 25, 2025, accessed 18 Sep 2025, <https://www.dailysabah.com/opinion/op-ed/india-us-relations-and-cost-of-strategic-autonomy>

³ S&P Global, "Geopolitical Risk," accessed 18 Sep 2025, <https://www.spglobal.com/en/research-insights/market-insights/geopolitical-risk>.

⁴ Tanvi Madan, "A Challenging Moment for the US–India Relationship," *Brookings Institution*, accessed 13 Aug 2025, <https://www.brookings.edu/articles/a-challenging-moment-for-the-us-india-relationship>.

⁵ Ashok Sharma, "Trump's Tariff Gambit Puts the India–US Strategic Partnership at a Crossroads: What's Next for India's Global Strategy," *Times of India Blogs*, accessed 13 Aug 2025, <https://timesofindia.indiatimes.com/blogs/ashoks-statecraft/trumps-tariff-gambit-puts-the-india-us-strategic-partnership-at-a-crossroads-whats-next-for-indias-global-strategy>.

⁶ Yakshrajsinh Jadeja, "India's Geopolitical Tightrope in 2025," *Reflections Live*, accessed 02 Sep 2025, <https://www.reflections.live>.

⁷ James Crabtree, "Why India Should Not Walk into the China–Russia Trap," *Foreign Policy*, accessed 27 Aug 2025, <https://www.foreignpolicy.com>.

⁸ Chatter Singh, Prastha Rajoria, and Rajeev Kumar Ranjan, "Assessing the Geopolitical Landscape: India's Strategic Position in a New World Order," *ShodhKosh: Journal of Visual and Performing Arts* 5, no. 6 (June 2024), accessed 03 Sep 2025, <https://doi.org/10.29121/shodhkosh.v5.i6.2024.2829>.

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