

The Hoover Institution's

# Annual Survey of India 2026

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## 3. India's Foreign Policy amid Global Unpredictability

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India's foreign policy has been shaped by three imperatives since the country gained independence almost eighty years ago: insecurity, underdevelopment, and status seeking.<sup>1</sup> India has long faced multiple acute internal and external security challenges, including ethnonationalist insurgencies and unresolved border disputes with China and Pakistan. In parallel, successive Indian governments have wrestled with the equally complex challenge of lifting a large population out of poverty and delivering the economic power needed to defend and extend India's national interests. Finally, India's leaders have been animated by a perceived need to restore global respect for the country.<sup>2</sup>

In response to these imperatives, India's first prime minister, Jawaharlal Nehru, crafted a strategy that combined nonalignment, economic self-reliance, and diplomatic activism. Nehru argued that alliances would drag India into conflicts it could not afford and undermine its ability to manage security challenges closer to home; economic openness would result in dependence rather than the growth India needed; and diplomatic passivity would lead to the voices of hundreds of millions being ignored.<sup>3</sup> He attempted to deliver security, prosperity, and status by keeping India out of the Cold War and equidistant from the capitalist West and communist East, allowing

New Delhi to focus on security and self-reliant development closer to home. Most analysts argue that this Nehruvian strategy was at best only partially successful, but it proved hard to replace. Nehru's successors continued to eschew alliances and resist liberal economics for the remainder of the Cold War, though they formed a limited partnership with the Soviet Union, and India remained vocal on the global stage.<sup>4</sup>

In the 1990s, however, domestic economic woes, ongoing security threats from China and Pakistan, festering ethno-religious tensions, and the collapse of the Union of Soviet Socialist Republics (USSR) compelled India to seek a new approach. In response, New Delhi liberalized much of the Indian economy, acquired a nuclear deterrent, and tentatively explored new partnerships, including with the United States.<sup>5</sup> It remained allergic to alliances, but this self-imposed constraint did not hold India back. By the mid-2000s, rapid economic growth and changing global security dynamics brought India new suitors and greater esteem. Manmohan Singh's Congress-led coalition government capitalized by forging a strategic partnership with the United States while simultaneously engaging with other rising powers in forums like BRICS (Brazil, Russia, India, China, South Africa), a minilateral grouping formed in 2006.<sup>6</sup>

*A Chapter from The Hoover Institution's Annual Survey of India 2026*

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Some analysts argued that “multialignment” had replaced nonalignment, just as economic openness had replaced the pursuit of self-reliance.<sup>7</sup>

These changes were significant, but they did not deliver social and economic development as rapidly and consistently as Indian voters wanted, resolve India’s major security challenges, especially those posed by China and Pakistan, provide strategic autonomy, or restore India to what voters saw as its “rightful place in the world.”<sup>8</sup> In the early 2010s, frustration about these issues mounted and helped propel Narendra Modi’s Bharatiya Janata Party (the Indian People’s Party, or BJP) into power. Modi promised “better days” for India’s economy, a more muscular approach to China and Pakistan, and more energetic diplomacy to make India a “leading power.”<sup>9</sup> Enlisting the veteran diplomat Subrahmanyam Jaishankar to run the foreign ministry and then to serve as external affairs minister (EAM), Modi then deepened India’s defense and security ties to the United States, as well as to Australia and Japan, sought a new *modus vivendi* with China through personal diplomacy, ratcheted up diplomatic and military pressure on Pakistan, and solicited greater foreign direct investment to boost economic growth. Favoring great power diplomacy and small group “minilateralism” over older preferences for developing world solidarity and multilateralism, as Christopher Odgen notes, Modi sought to position India as a new pole of global influence in an emerging multipolar order.<sup>10</sup>

## RISING AMID UNPREDICTABILITY

In this endeavor the Modi government has, however, found the going difficult. The polarization of politics in the United States, Chinese assertion on the border, periodic attacks by Pakistan-based terrorists, Russia’s invasion of Ukraine, market instability, and technological disruption have complicated India’s pursuit of domestic and foreign policy objectives. Moreover, this instability and

its effects on India has undermined New Delhi’s confidence and led to a reassessment of aims and tactics. In a book published a couple of months before Indian voters went to the polls to reelect the Modi government in 2024, Jaishankar observed that rising powers prefer stable international contexts that allow their governments to focus on domestic economic and social development. Yet India, he noted, has learned from experience that it can expect no such luxury. Instead, India must “plan to rise,” as Jaishankar put it, “amidst serious unpredictability.”<sup>11</sup>

This observation remains pertinent. India’s circumstances have not improved since the election. International relations have become less predictable, and several of India’s most important relationships have become markedly more difficult to manage. Donald J. Trump’s return to the presidency has resulted in a tussle over the terms of global trade that could do lasting damage to bilateral ties.<sup>12</sup> Questions are now being asked about the Trump administration’s commitment to the *strategic altruism* that helped build a robust US-India strategic partnership over the past twenty-five years.<sup>13</sup> Meanwhile, China continues to wield its economic power in ways detrimental to Indian interests, despite a deal struck late in 2024 to stabilize their contested frontier and another in 2025 to wind back some of the sanctions imposed after the border clash in 2020.<sup>14</sup> To India’s west, there is no sign that Pakistan is likely to become more willing to settle long-standing bilateral differences. On the contrary, indications are that the brief armed conflict between the two in May 2025 has strengthened the hand of Pakistan’s army—as well as the military establishment’s strategic ties to China and Türkiye—and weakened civilian leaders who might be keener to compromise with New Delhi.<sup>15</sup> On India’s other flank, the collapse of a friendly government in Bangladesh has brought to power elements skeptical of close ties with New Delhi.<sup>16</sup> Finally, India’s simultaneous engagement of Russia and European states, as well as the Global South, has brought only a mixed set of benefits.<sup>17</sup>

Amid this instability, delivering the social and economic development that India's citizens rightly expect and achieving the goals New Delhi has set itself in foreign policy will continue to be difficult. Narendra Modi's coalition government, led by the BJP, has promised to deliver a Viksit Bharat (Developed India) by 2047, the hundredth anniversary of independence. It has pledged to make India a strong, autonomous, respected, and influential "leading power" in what is widely perceived in India to be an increasingly multipolar world.<sup>18</sup> Many analysts agree, however, that realizing these two ambitions will require both higher annual rates of economic growth than the average of 6–7 percent achieved over the past decade and—at the very least—some deft diplomacy from New Delhi.<sup>19</sup> It will likely also need, as Jaishankar has suggested, a more forgiving set of international circumstances than those India presently confronts.

This chapter assesses this difficult situation and the foreign policy that Modi's government has pursued since securing a third term. The first sections explore New Delhi's management of three crucial relationships—with Russia, the United States, and China. The next part turns to the course of the crisis precipitated by a horrific terrorist attack in Kashmir and India's military retaliation seventeen days later and the brief conflict with Pakistan that action kindled, as well as its unsatisfactory outcome for New Delhi. The last sections look at the Modi administration's efforts to forge stronger ties with European states and the Global South.

## **MODI TO MOSCOW**

Most foreign observers expected a decisive victory for the BJP in the 2024 general election. Few anticipated that voters might desert the party in significant numbers, especially in the party's traditional northern heartlands. So when the news broke that the BJP had lost the absolute majority it won in 2014 and 2019, it surprised international analysts and foreign governments. Questions were

asked about the political future of the prime minister, the stability of the incoming administration, and, of course, the implications for India's foreign policy.<sup>20</sup>

Modi moved quickly to quell such speculation and to settle a jittery stock market.<sup>21</sup> Less than a week after the election result was announced, he unveiled a cabinet that retained most of his senior ministers in the portfolios they had held in his earlier government.<sup>22</sup> Signaling continuity in the management of India's international relations, as well as prime ministerial confidence in the team, Jaishankar was reappointed EAM, Rajnath Singh as defense minister, and Piyush Goyal as minister of commerce and industry, while Ajit Doval was installed as national security advisor (NSA) for a third term. Vikram Misri, who had earlier served as deputy NSA and ambassador to China, was promoted to head the Ministry of External Affairs as foreign secretary, while his predecessor, Vinay Mohan Kwatra, was sent to Washington, DC, as India's envoy to the United States.

For a short while, these signals boosted confidence in Western capitals. The mood changed, however, when it was announced that Modi would make his first foreign engagement of the new term a visit to Moscow to meet Russian President Vladimir Putin. For three reasons, this trip irritated US President Joseph R. Biden's administration and several European governments.<sup>23</sup> First, there was its timing, which came not just immediately after India's election but also immediately before a North Atlantic Treaty Organization summit. Then there was the carefully choreographed footage of Modi and Putin embracing each other and taking tea in the garden of one of the Russian leader's summer residences, as well as of the Indian prime minister receiving Russia's highest award, the Order of Saint Andrew the Apostle.<sup>24</sup> Finally, there were the meager outcomes of the meeting, which amounted to little more than a promise to boost bilateral trade and investment, raising questions about the purpose and the wisdom of the visit.<sup>25</sup>

Some observers justified the Moscow summit as crucial to New Delhi's ongoing effort to encourage Russia not to align too closely with China and to honor defense contracts important to India.<sup>26</sup> Others suggested that the Modi government also wanted to display India's "strategic autonomy" to both domestic and international audiences during a rocky period in the US-India relationship.<sup>27</sup> There is merit to both arguments. Even before the bloody Galwan clash between Indian and Chinese troops on their disputed frontier in June 2020, Indian observers were concerned about a putative Sino-Russian Eurasian entente.<sup>28</sup> The confrontation deepened anxiety in New Delhi, highlighted gaps in India's defense capabilities, and amplified concerns about delays of the supply of key assets, including air defense systems, by Russian firms—delays since made worse by the demands imposed on Russia's defense industry by the Ukraine war from February 2022 onward.<sup>29</sup> Modi's visit provided an opportunity to remind Moscow of those obligations, as well as to complain to the Russian president about schemes designed to dupe Indian citizens into fighting for the Russian army.<sup>30</sup>

Yet it was also clear—especially in the public bonhomie between Modi and Putin on display during the visit—that the Indian prime minister wanted to remind the United States, European observers, and audiences back home that the West does not have a veto over India's foreign policy. The Moscow visit signaled that his re-elected government would do what was needed to protect India's strategic autonomy.<sup>31</sup>

This message was not entirely unexpected. It came after a period of several years in which tensions had become evident in the US-India relationship. Some of these concerned the Modi government's domestic agenda, which some American analysts and officials—including long-standing proponents of stronger bilateral ties—worried was becoming increasingly majoritarian and authoritarian.<sup>32</sup> On the Indian side, elements within the BJP and beyond had grown frustrated about what they

perceived as unnecessary criticism of the Modi government and unwarranted interference in India's internal affairs by the Biden administration and Western liberals more broadly.<sup>33</sup> In parallel, frustration mounted in Washington, DC, over what was seen as the slow pace of progress in advancing the strategic partnership and the direction of Indian policy—even on China, the issue that had done the most to catalyze stronger US-India ties after Modi had first come to power in 2014.<sup>34</sup> India's unwillingness to criticize Russia's invasion of Ukraine made matters worse, as did allegations that Indian officials had directed the murder of a Sikh militant in Canada and conspired to kill another separatist leader in New York.<sup>35</sup>

The Moscow visit and the Modi government's desire to demonstrate India's strategic autonomy—as well as the tetchy reaction from the United States—simply brought these tensions out into the open, where they festered. For the remainder of Biden's term, these differences remained on display, and more were added as both sides sniped at each other over various issues. Divergences of view or policy—real or apparent—were taken as opportunities to score points, especially by the Indian side. For example, following the sudden fall of Sheikh Hasina's government in Bangladesh in August 2024, prominent commentators aligned with the BJP claimed that the United States had conspired to bring about "regime change" in Dhaka, partly to undermine India's interests.<sup>36</sup> These claims, amplified by Hasina herself but lacking evidence, were so widely circulated that the State Department was forced to issue a blunt denial.<sup>37</sup> Other voices associated with the Modi government openly criticized the Democrats' views about India's trajectory and aligned themselves ideologically with a resurgent Trump.<sup>38</sup>

## TRUMP EFFECTS

These disputes revealed a deficit of trust between the United States and India, but they did not

prevent the two governments from working together on various initiatives in the final months of the Biden administration. Soon after the Modi government's reelection, NSA Jake Sullivan traveled to New Delhi and met the prime minister, and both sides reiterated their commitment to collaborate on several high-technology projects.<sup>39</sup> In August 2024, Defense Minister Rajnath Singh visited Washington, DC, and signed two new defense agreements.<sup>40</sup> The following month, Modi joined Biden in Delaware for a Quad summit that should have been held in India. Together with their Australian and Japanese counterparts, the Quad leaders announced the expansion of the minilateral grouping's agenda, especially in health, and new maritime security initiatives for the Indo-Pacific.<sup>41</sup> Finally, in November the United States and India held their first-ever bilateral Indian Ocean dialogue.<sup>42</sup>

With India looking forward to hosting the Quad summit in 2025 and keen to secure other interests, New Delhi was quick to engage the incoming Trump administration. In mid-February, soon after the inauguration, Modi went to Washington, DC, to meet the president and congratulate him on his victory. This swift engagement was partly motivated by the perception—widely shared within the BJP and the Indian strategic community—that the incoming administration was likely to prove more amenable to the interests and concerns of the Modi government than Biden and the Democrats.<sup>43</sup> The Modi-Trump meeting in the Oval Office did meet some of these expectations. The Indian prime minister secured commitments to continue with several important Biden-era initiatives and new undertakings, including a civilian version of the INDUS-X defense technology partnership, dubbed INDUS-Innovation, as well as an in-principle deal to renew the bilateral Defense Framework Agreement for another decade.<sup>44</sup> The two countries pledged to boost bilateral trade to the value of \$500 billion by 2030, India promised to buy more American military equipment, and Modi discussed Tesla's long-delayed entry into India.<sup>45</sup>

Looming in the background during the Oval Office meeting, however, were two challenges: the Trump administration's management of both illegal immigration and legal migration and the president's views about the bilateral economic relationship. A few days before Modi arrived in Washington, DC, the new administration deported more than a hundred Indian citizens that it claimed were undocumented migrants or who had overstayed their visas. This group was flown to Amritsar on a military aircraft, handcuffed and chained at the ankle. While New Delhi had previously indicated that it would accept deported Indian nationals, the conditions in which these people and several others were returned to India attracted both media comment and criticism from opposition politicians.<sup>46</sup> Modi was asked about the deportations in his press conference with Trump and downplayed the issue. But he could not defuse it altogether nor assuage the growing concern in India that the United States might also restrict visas for Indian students and skilled workers.<sup>47</sup>

In Washington, DC, Modi also tried to change the president's mind about the state of the bilateral economic relationship, but here, too, he made little progress. On the campaign trail, Trump had called India a "very big abuser" of tariffs.<sup>48</sup> He did not repeat this claim in those words during the Oval Office meeting, but he did signal before and during the meeting that he wanted India to buy from the United States and invest more in the United States, and he refused to grant Modi a waiver from promised tariffs on Indian goods.<sup>49</sup> Things did not improve as Trump settled back into office. On April 2, 2025, the president unveiled what he called "reciprocal" tariffs that would apply to almost all trade partners unless they negotiated new economic agreements with the United States. He claimed that India charged an effective rate of 52 percent on US goods and so would now be subject to a 26 percent or 27 percent tariff on imports into the United States unless a better deal could be struck.<sup>50</sup> Negotiations commenced, but an agreement could not be made by Trump's first

deadline of July 9, which was later extended—unilaterally—to August 12.<sup>51</sup>

In the meantime, two other problems arose—neither apparently anticipated by New Delhi. The first involved Pakistan. On April 22, 2025, five terrorists killed twenty-six men and injured another twenty people at Pahalgam in Kashmir. It was the deadliest militant Islamist attack in India since the Pulwama incident in mid-February 2019 and inflicted the highest civilian death toll in more than two decades. For those reasons, as soon as the news of the attack emerged it was clear that the Modi government would respond militarily, as it had after Pulwama.<sup>52</sup>

On May 7, that response came. India fired missiles at what New Delhi claimed was terrorist infrastructure in Pakistan-administered Kashmir and Pakistan proper. Pakistan responded and a four-day-long conflict ensued, until a cease-fire was reached on May 10.<sup>53</sup> The first news of the cessation of hostilities came not from New Delhi or Islamabad, however, but from Trump's social media account, where he claimed that the United States had played mediator and brokered the deal. Secretary of State Marco Rubio then suggested that India and Pakistan had also agreed "to start talks on a broad set of issues at a neutral site."<sup>54</sup> Trump claimed a little later that the United States had offered possible trade concessions to secure a deal.<sup>55</sup> The Modi government, however, denied all these claims. New Delhi declared that the ceasefire was the "result of direct communication" between Indian and Pakistani military commanders, without intermediaries. It insisted there was "no agreement to hold discussions on any other issues at any other location."<sup>56</sup>

The Modi government was forced into this disagreement because the US president had unexpectedly placed India in an unwelcome bind. Trump and Rubio's statements threatened to "re-hyphenate" India and Pakistan after twenty-five years of "de-hyphenation," during which the

United States had accepted India's view that disputes with Pakistan should be settled bilaterally, without third-party involvement.<sup>57</sup> De-hyphenation also implied that the United States would not make any aspect of its relationship with India conditional on how it dealt with Pakistan.<sup>58</sup> Trump's repeated claims in the days immediately after the May crisis that he had mediated the cease-fire, used trade concessions as leverage, and secured a commitment for negotiations over Kashmir appeared—especially to New Delhi—to cast all these understandings aside. Moreover, they raised the possibility of an unwelcome rapprochement between the United States and Pakistan following more than a decade of estrangement brought about by the discovery in 2011 that al Qaeda's Osama bin Laden had been sheltering in relative comfort not far from Islamabad for years after 9/11.<sup>59</sup>

Worse was still to come. On June 17, Modi was due to meet Trump for a meeting on the sidelines of the Group of 7 (G7) summit in Vancouver, Canada. This discussion was called off, however, when the president decided to leave early and return to Washington, DC. Instead, the two leaders spoke on the phone, and the conversation did not go well. According to the *New York Times*, Trump informed Modi that Pakistan intended to nominate the president for a Nobel Peace Prize for his supposed role in brokering a ceasefire. He then invited Modi to stop over in Washington, DC, on the way back to India from the G7 and join him for lunch with Pakistan's top military commander, the newly promoted Field Marshal Asim Munir.<sup>60</sup> Hours afterward, India's foreign secretary, Vikram Misri, summarized the Indian prime minister's response to these entreaties in an unusually frank statement:

Prime Minister Modi clearly conveyed to President Trump that at no point during this entire sequence of events was there any discussion, at any level, on an India-U.S. Trade Deal, or any proposal for a

mediation by the U.S. between India and Pakistan. The discussion to cease military action took place directly between India and Pakistan through the existing channels of communication between the two armed forces, and it was initiated at Pakistan's request. Prime Minister Modi firmly stated that India does not and will never accept mediation.<sup>61</sup>

These points made, Modi apparently refused to take any further calls from Trump, while the United States proceeded to entertain Munir at the White House on June 18 and conclude an oil deal with Pakistan a month later.<sup>62</sup>

These developments appear to have been unanticipated by a government that had earlier convinced itself that Trump's return to the White House would be mostly, if not entirely, good for India and for the BJP. They overshadowed the US-India trade negotiations prompted by Trump's imposition of tariffs in April, which ran on until August, and then into a new storm. As talks to settle the Ukraine war dragged on, a frustrated Trump hit out not at Moscow but at New Delhi, focusing his ire on India's substantial purchases of Russian oil.

Up to that point, since the war began in February 2022, Washington, DC, had mostly turned a blind eye to this trade, despite its scale.<sup>63</sup> By 2024, India was importing an average of 1.9 million barrels of Russian oil a day, partly for domestic consumption and partly to refine and on-sell the products into other markets. Quietly, American policymakers judged this as good for the United States and good for the world economy, as India was helping to keep the global oil price low.<sup>64</sup> Moreover, they recognized that Russia's ability to use the revenue earned was limited because India paid for at least some of this oil in hard-to-convert rupees.<sup>65</sup> For these reasons—and because the Modi government assumed that once he returned to the presidency Trump would seek some kind of reconciliation with Putin, as

well as an end to the Ukraine war—India carried on buying, refining, and on-selling, despite occasional expressions of concern in the West, and confidently rebuffed such criticism when it arose.<sup>66</sup>

Trump's decision in August 2025 to single out and punish India—but not China—for purchasing Russian oil by doubling the proposed tariffs on Indian goods entering the US market thus came as another unpleasant surprise to New Delhi, even after the earlier disagreements about the India-Pakistan ceasefire.<sup>67</sup> His subsequent executive order imposing a new \$100,000 fee on H-1B skilled-worker visa applications, which will affect thousands of Indians, came as less of a shock but further deepened the malaise in the US-India relationship.<sup>68</sup> These actions raised more questions about the president's commitment to the US-India strategic partnership and led to a new round of attacks on the Modi government by opposition politicians.<sup>69</sup> It prompted some to speculate that India might walk back some commitments to buy US arms and to cooperate in sensitive areas. Indeed, Trump's behavior toward India, combined with the president's apparent tilt to Pakistan and the lack of clarity about his China policy, left the bilateral relationship in a far more precarious condition than it had been just six months earlier, when he returned to the White House.<sup>70</sup> It also put at risk regional initiatives, including the Quad, important to India as a means of managing Beijing's power and ambition.

## STABILIZATION

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These developments did not come at an ideal time for the Modi government, as it moved after the election to stabilize the situation on the contested Line of Actual Control (LAC) and to find a new equilibrium for India's wider relationship with China. The bloody Galwan clash in June 2020 surprised New Delhi and led to major changes to India's China strategy, as New Delhi shifted to balance China's power and frustrate Beijing's

agendas.<sup>71</sup> The clash itself precipitated a dangerous armed stand-off all along the LAC that lasted for another eighteen months, during which there were further skirmishes, though no more deaths and no escalation beyond hand-to-hand fighting with a few shots fired.<sup>72</sup> It demanded that India embark on an expensive effort to deploy significant military forces, including armor and aircraft, into inhospitable areas and rapidly acquire new capabilities.<sup>73</sup> Seeking to pressure Beijing into pulling back, India complemented this change in military posture by imposing a broad set of sanctions on China, including a ban on direct flights between the two countries, the suspension of visa processing for Chinese nationals, restrictions on the use of Chinese technology and apps, as well as trade in some goods, and curbs on Chinese investment.<sup>74</sup> In parallel, India broadened and deepened cooperation with strategic partners, including the other three members of the Quad.<sup>75</sup> In various regional bodies and minilateral grouping, including the Shanghai Cooperation Organization (SCO), India's diplomats also worked to undermine China's ability to secure its interests and advance its vision of global governance.<sup>76</sup>

Yet New Delhi struggled to induce Beijing to explain why Chinese troops transgressed, took territory, and acted so aggressively at Galwan, let alone acknowledge India's claim that China's actions violated long-standing agreements for managing the border areas and secure a deal to restore the *status quo ante*. Xi Jinping's government repeatedly offered to talk to India in the aftermath of the clash and the stand-off that followed, but it was clear from early discussions between senior officials that it would not meet New Delhi's expectations.<sup>77</sup> Over time it also became obvious that the Modi government considered the situation on the LAC a domestic political liability.<sup>78</sup> As a result, after early bilateral talks in 2020 and 2021 made little progress, New Delhi was circumspect in its engagement of China until after the 2024 election, despite growing cross-border trade and India's thirst for foreign investment.<sup>79</sup>

A breakthrough finally came in late October 2024. Several meetings between Jaishankar and his Chinese counterpart Wang Yi and between national security advisors beginning in July 2024 led to a deal to disengage their forces in the areas where Indian and Chinese troops remained in close proximity and to allow India's forces to resume patrolling as they had before Galwan, at least on some parts of the LAC.<sup>80</sup> This opened the way for more talks about the relaxation of some of the sanctions India imposed on China after Galwan and about the cooperation in areas of mutual interest. This process was not fast, however, nor was it complete. In July 2024, there were reports that India would relax curbs on Chinese investment, but a year later these restrictions were still in place.<sup>81</sup> In July 2025, New Delhi did announce that it would resume visa processing for Chinese nationals and once more permit direct flights.<sup>82</sup> The following month, India and China said they would resume some dialogue on the border dispute, creating new expert and working groups, revive some people-to-people contact, and reopen some trade routes.<sup>83</sup> But significant restrictions, such as those concerning investment, remained in place.

Leader-level engagement also resumed, but tentatively. A couple of days after the patrolling agreement was signed in October 2024, Modi met Xi on the sidelines of a BRICS summit in Russia for their first bilateral meeting in five years and agreed to "explore a fair, reasonable and mutually acceptable solution to the boundary question," but little else.<sup>84</sup> During Modi's visit to China to attend an SCO summit—his first visit in seven years—similar statements were made, but no agreements were reached.<sup>85</sup>

These changes were not trivial, but they fell well short of a normalization of Sino-Indian ties or a return to the relationship the two had before Galwan. Both states are continuing to upgrade strategically important infrastructure along the LAC, and both are maintaining large military

forces close to the contested frontier. Both are still engaged in open and costly strategic competition in multiple domains. Beijing's informal restrictions on the export of certain high technologies, for example, are reportedly undermining India's ability to boost domestic manufacturing of cell phones and electric vehicles.<sup>86</sup> China's assistance to Pakistan, including the provision of advanced weapons and perhaps even real-time intelligence, may have substantially enhanced the latter's ability to respond to India's military action in the May 2025 border crisis.<sup>87</sup> In parallel, aside from the various measures New Delhi took in the weeks and months after Galwan that remain in place, India is still exploring ways to restrain Beijing or complicate Chinese strategy, including building stronger strategic partnerships with states like the Philippines to enhance their capacity to resist Chinese coercion in the South China Sea.<sup>88</sup>

It is still too early in the Trump administration to determine whether the United States will continue to work with India in these efforts to compete with China and balance Chinese power. Worryingly for New Delhi, signs indicate that the United States may be less committed to these tasks than it was under Biden or indeed during Trump's first term in office. Trump appears to be focused on striking a trade deal with Beijing, but some Indian analysts fear that the president may seek a bigger grand bargain across a range of issues that would undercut India's interests.<sup>89</sup> That concern, along with India's growing dependence on Chinese goods and need for foreign direct investment, has likely influenced the nature and the pace of New Delhi's cautious reengagement of Beijing over the past year. But the Modi government's parallel effort to maintain a positive relationship with Moscow and encourage Russia to keep its distance from China suggests that regardless of the direction of US strategy, India still wants to see a multipolar Indo-Pacific where security and prosperity is underpinned by a balance of power between several significant states, rather than a China-dominated Asia.<sup>90</sup>

## PAKISTAN AND PAHALGAM

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Pakistan featured prominently in India's election in 2024, even though the campaign was not marred—as the previous one had been—by a terrorist attack. In 2019 the ambush of a Central Reserve Police Force convoy by a Jaish-e-Mohammed suicide bomber at Pulwama in mid-February and India's retaliatory air strikes twelve days later overshadowed electioneering. These events allowed Modi to present himself to voters as a humble but ever-vigilant *chowkidar* (watchman) securing India from attack.<sup>91</sup> In the 2024 campaign, Modi took on a different persona, but the threat from Pakistan was ever present in his speeches, which pointed to the need for a strong government in New Delhi to deter cross-border terrorism and to punish the perpetrators of attacks when they occurred.<sup>92</sup>

Initially, when it first came to power, the Modi government had tried a more emollient approach to Pakistan.<sup>93</sup> The prime minister invited his Pakistani counterpart, Nawaz Sharif, to his swearing in and thereafter attempted to build a personal rapport. The two met four more times over the next eighteen months in various locations, including at a Sharif family wedding in Lahore in December 2015. In parallel, talks between the two countries' foreign ministers and national security advisors took place, while an informal backchannel was maintained by the industrialist Naveen Jindal.<sup>94</sup> These discussions resulted in a deal to abide by the ceasefire on the Line of Control (LoC) in Kashmir and to begin what was dubbed a "comprehensive bilateral dialogue."<sup>95</sup> The dialogue never started, however. In early January 2016, terrorists attacked India's Pathankot airbase, killing fourteen people, and then new tensions emerged, notably over the fate of the alleged spy Kulbhushan Jadhav, detained in Pakistan in March. For several more months, Indian and Pakistani officials continued to talk, but testily and without agreement. These interactions ended with another terrorist attack at Uri on September 18, 2016, and India's punitive

cross-border raid on what it claimed were militant camps a few days later.<sup>96</sup>

Afterward, the Modi government adopted a new multipronged strategy designed to contain Pakistan and coerce Islamabad into making concessions, especially on terrorism. This strategy entailed a suspension of high-level political and diplomatic dialogue, tight restrictions on trade and the movement of people, diplomatic pressure within multilateral institutions focused on human rights abuses and the alleged backing of terrorism aimed both at shaming Pakistan and at isolating it, the acquisition of new military capabilities that would allow India to strike targets at range, the reservation of the right to take such action and to change the status of Kashmir without consulting Islamabad, and an apparent escalation in covert activities inside Pakistan, including the targeted killing of militant leaders. This hard-line approach did not stop cross-border terrorism, as the Pulwama attack in 2019 showed. Nor was it risk-free, as the mixed results of the post-Pulwama airstrikes, which caused some damage to militant camps but also involved the loss of an Indian aircraft, demonstrated. But it was supported by many Indians tired of terrorism itself and tired of the inability or unwillingness of Pakistan's leaders to rein in the militants.<sup>97</sup>

The Pahalgam episode on April 22, 2025, and the short conflict that followed tested that resolve and the limits of India's strategy. The nature and the scale of the attack—which resulted in the highest civilian death toll since 2008—were calibrated to embarrass the Modi government and to provoke a response. Unlike the Pathankot, Uri, and Pulwama incidents, where the targets were the Indian security forces, the Pahalgam terrorists aimed at tourists enjoying a celebrated beauty spot in Jammu and Kashmir, singling out Hindu men and gunning them down.<sup>98</sup> Both the targets and the location appear to have been chosen to undermine government claims that Jammu and Kashmir were now safe to visit, thanks to its efforts to secure the

state and deter terrorism.<sup>99</sup> It was thus inevitable that the Modi government would respond robustly to such a provocation.

That response began with a series of diplomatic moves. On April 23, India suspended the 1960 Indus Waters Treaty, canceled visas for Pakistani nationals, closed the border crossing at Attari in Punjab, and declared the military advisors at Pakistan's embassy in New Delhi *persona non grata*. Then, in the early morning of May 7, India launched what it called Operation Sindoor, carrying out airstrikes on at least nine locations in Pakistan-administered Kashmir and Pakistan itself.

Thereafter, however, the situation escalated unpredictably. Later, on May 7, an aerial engagement took place during which neither Indian nor Pakistani aircraft seem to have crossed the border, but dozens of missiles were fired at range, and several planes were shot down. The next day both militaries launched missiles and drones at multiple targets, India struck an air defense system near the Pakistani city of Lahore, and skirmishes and exchanges of artillery fire occurred along the LoC in Kashmir. May 9 saw a partial lull in fighting, but on May 10 it is clear the crisis came to a head, even if the exact sequence of events is not yet established. Pakistan launched ballistic missiles and drones as part of a retaliatory operation it called *Bunyan-um-Marsoos* (roughly, a wall or structure of lead). India quickly responded with missile and drone attacks on Pakistani airbases, including Nur Khan in Rawalpindi, the VIP transport hub near army headquarters. Several locations were targeted—some command-and-control centers. The best analysis we have suggests that India prevailed in this final exchange of the short conflict. Most of Pakistan's missiles and drones were intercepted or missed their targets, while India successfully struck what its forces intended to hit.<sup>100</sup>

Yet having lost the war, Pakistan—or rather Pakistan's army—then won the peace. Trump's claims about the ceasefire negotiations brought

into question both de-hyphenation and India's insistence that bilateral disputes be addressed bilaterally.<sup>101</sup> With New Delhi off balance, the military establishment in Rawalpindi pressed its advantage, claiming the army had once again successfully defended the Pakistani nation. This public relations effort secured both a promotion to the rank of field marshal for Army Chief Asim Munir and lunch for the Pakistani commander with the US president a few weeks later.<sup>102</sup> Deals to lower the US tariff on imports from Pakistan and to co-invest in the development of Pakistani oil fields followed, as talks between the United States and India rumbled on.<sup>103</sup>

Together, these developments threatened to undermine the strategy India has pursued since 2016. That approach combines blocks on most trade and people-to-people contact, strict limits on political interaction, efforts to diplomatically isolate Islamabad, regular denunciations of Pakistan's complicity with terrorists, and promises to take military action should attacks take place.<sup>104</sup> This strategy had weaknesses—New Delhi could do little to prevent China from working to support Pakistan's economy and upgrade its military capabilities—but it had arguably contained at least some of the threat from militant groups operating from Pakistan or with support from elements within Pakistan, thanks partly to American support. Washington, DC's, unwillingness to reengage Islamabad and tacit approval of India's military strikes helped to maintain the pressure on Pakistan that New Delhi sought to impose. Now, however, Trump's actions appear to have relieved at least some of that pressure, while Pakistan's escalatory behavior during the May conflict and the effect that had on third parties, including the United States, has undermined the credibility of India's threat to punish Pakistan when further terrorist attacks occur. The course and conclusion of the crisis was yet another reminder of the unpredictability of international relations and the ability of third parties to complicate New Delhi's calculations about bilateral relationships.

## ARMS AND MOBILITY

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A useful way to gauge the foreign policy priorities of a government is to map where its leaders travel, as a recent article reminds us.<sup>105</sup> Clear patterns emerge if we look at the trips taken by the prime minister and foreign minister after the election. Between the 2024 election and August 31, 2025, Modi made thirty foreign visits for bilateral meetings and minilateral or multilateral summits, while Jaishankar made no fewer than sixty. For both leaders, around a quarter of these trips were to European states (excluding Russia). For Modi, these were to Austria, Croatia, Cyprus, France, Poland, the United Kingdom (twice), and Ukraine. For Jaishankar, they included Austria, Belgium, Cyprus, France (twice), Germany (thrice), Ireland, Italy, the Netherlands, Poland, Spain, Switzerland, the United Kingdom (twice), and Ukraine. By contrast, the prime minister and foreign minister each went to only three African states.<sup>106</sup>

This strong emphasis on Europe arises from longstanding and emerging geostrategic interests. The European Union (EU) is one of India's top three trading partners, along with the United States and China, with bilateral trade in goods and services amounting to €180 billion (\$210 billion) and a stock of EU investment in India that totaled €140 billion (\$163 billion) in 2023.<sup>107</sup> Europe as a whole, including the United Kingdom, offers considerable economic opportunities and a chance for diversification to ensure India is not too dependent on US or Chinese markets or supply chains. New Delhi has thus devoted considerable diplomatic effort to building stronger relationships with European states, and several are now significant strategic partners in the areas of trade and investment, defense, high technology, and labor mobility.<sup>108</sup> In July 2025, India secured an agreement with the United Kingdom to boost the value of bilateral trade beyond the current £42 billion (\$57 billion) and investment in India beyond the current stock of £17.5 billion (\$23.6 billion).<sup>109</sup> With the pressure of Trump's tariffs in the background,

the EU and India have also committed—somewhat optimistically—to conclude an interim free-trade agreement by the end of 2025.<sup>110</sup>

In defense, India has a well-established relationship with France, which has provided several generations of fighters, including the Dassault Rafale and associated armament, as well as Scorpène-class submarines (locally built as the Kalvari class) and the Airbus C-295 transport aircraft.<sup>111</sup> In April 2025, New Delhi committed to purchasing more Rafales, this time for the navy, and in August, India and France struck an agreement to develop much-needed jet engines.<sup>112</sup> In parallel, India is also looking to other European partners to buy arms and to facilitate technology transfer to build up its domestic industry. Recently, it signed a deal with the United Kingdom to permit the British firm Thales and Bharat Dynamics Limited to develop advanced missiles and agreed to a ten-year defense industrial “road map.”<sup>113</sup> Talks with Germany’s thyssenkrupp to build six new conventional submarines equipped with coveted air-independent propulsion in India are also underway.<sup>114</sup> Poland and India have agreed to explore a defense industrial collaboration as part of a broader strategic partnership.<sup>115</sup> In parallel, New Delhi is exploring opportunities to export arms to European states, as defense spending rises on the continent, and India seeks to expand and improve defense manufacturing.<sup>116</sup>

High-technology partnerships with the EU and European states are also a significant Indian concern. In 2023 the EU and India launched a ministerial-level Trade and Technology Council, with working groups on strategic digital technologies, green and clean energy, and supply chain resilience.<sup>117</sup> In 2024, just after India’s election, a parallel UK-India Technology and Security Initiative was announced, to be coordinated by their respective national security advisors. This broad-ranging initiative aims to boost private-sector collaboration on telecommunications, critical minerals, semiconductors, artificial intelligence, and quantum,

biotechnology, and advanced materials but also involves a strategic tech policy dialogue focused on governance and standards.<sup>118</sup>

Arguably just as important to India, however, is the potential that Europe may offer for labor mobility, especially if the United States moves to restrict skilled-worker visas, as the Trump administration has suggested it might and as the president did during this first term.<sup>119</sup> The recent mobility agreements New Delhi forged with Australia and the United Kingdom indicate India’s intent and ambition in this area. The first deal allows Indian students from Australian universities employment and residency rights for up to eight years postgraduation and permits up to three thousand early career professionals to go to Australia to work in various high-technology industries.<sup>120</sup> The second permits—among other things—more Indian citizens to obtain business visas and more Indian firms to temporarily transfer workers into the United Kingdom for up to three years.<sup>121</sup> India is also seeking similar or better arrangements from the EU as the two work toward a trade agreement.<sup>122</sup>

These mobility deals will not compensate for the loss of US skilled-worker visas, if the Trump administration succeeds in its bid to restrict access by imposing prohibitively high fees for applications. The H-1B scheme allows up to sixty-five thousand to be granted annually, and the majority—more than 70 percent in recent years—have gone to Indian workers.<sup>123</sup> By comparison, the Australian and UK mobility arrangements are far smaller. It is likely that an EU deal or deals with individual member states, such as those periodically mooted in recent years by Denmark, would also be relatively limited, with difficult pathways to permanent residency for Indian workers.<sup>124</sup> Europe may offer an economic haven for India in unpredictable times, but it cannot provide all that India needs. The EU and India are not aligned on trade nor environmental regulation.<sup>125</sup> European capitals must also focus on the ongoing threat from Russia

and the global instability generated by Trump. Even in defense and advanced technologies, challenges remain. And Europe lacks the scale, cultures of innovation, and manufacturing capacity that the United States and China can muster.

## OIL AND INFLUENCE

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Early in 2023, soon after India took over the chair of the G20, the Modi government convened an online Voice of the Global South summit, attended by the leaders and ministers of 125 states. The ostensible purpose of the event was to “deliberate on the concerns, interests and priorities that affect the developing countries” and feed these ideas into India’s G20 agenda. A second summit was held in mid-November, after the G20 leaders’ meeting, to brief the Global South on what had been agreed upon and to discuss what might be done.<sup>126</sup> These and other initiatives have been cast—not least by Jaishankar—as a major uplift in India’s cooperation with the developing world.<sup>127</sup>

This effort to reconnect India with the Global South came after almost a decade in which New Delhi focused more on engaging the major powers than it had in earlier times. That shift had not simply involved deepening partnerships with the United States and Japan, concentrating resources on managing China, and intensifying India’s involvement in minilateral groupings like the BRICS or the Quad, as Jaishankar outlined in the first of his two books—a volume that, notably, never mentions the phrase *Global South*.<sup>128</sup> This approach also entailed downgrading India’s commitments to established multilateral groupings that bring together many states from the Global South, such as the Non-Aligned Movement (NAM), the Group of 77, and the Commonwealth.<sup>129</sup> Modi—in contrast to most of his predecessors—has not attended any of the NAM summits held since he first came to power.<sup>130</sup> He did go to the 2018 Commonwealth Heads of Government meeting in London, seeing the organization as

a possible status marker, but India sent lower-ranking representatives to the summits in 2015, 2022, and 2024.<sup>131</sup>

India’s rebalancing of priorities toward the major powers has been attributed to ideology and status seeking but is explicable in terms of New Delhi’s meager diplomatic resources and the country’s need for investment, technology, and weapons.<sup>132</sup> It has come at a cost, however. During the late 2010s and into the 2020s, China continued to extend its influence across large sections of the developing world, as well as secure natural resources, using the Belt and Road Initiative (BRI) and other instruments.<sup>133</sup> And despite Indian sensitivities about other major powers playing significant roles in South Asia and the Indian Ocean region, New Delhi has even here been slow to respond. The Modi government has repeatedly promised to boost engagement with the neighborhood and Southeast Asia and worked with Japan on a vision for a parallel connectivity initiative to the BRI, the Asia-Africa Growth Corridor (AAGC), unveiled in 2017.<sup>134</sup> But the results of Neighborhood First and Act East are widely acknowledged to be mixed, and neither India nor Japan managed to formulate an implementation plan for the AAGC, still less commit resources to the project.<sup>135</sup>

When India’s responses did come, they were belated and more opportunistic than systematic or even strategic. The COVID-19 pandemic offered the first opening for what Jaishankar has called a “statement of solidarity” with the Global South.<sup>136</sup> Taking advantage of India’s large-scale drug-manufacturing capability and access to the Oxford-AstraZeneca vaccine—one of the first produced—as well as an indigenous product, New Delhi launched the so-called Vaccine Maitri initiative on January 20, 2021. This involved the export of tens of millions of doses of vaccine. It occurred, moreover, well before India could vaccinate most of its own citizens, highlighting the extent of New Delhi’s perceived need for some

instrument with which to push back on China's influence, especially in South Asia and the Indian Ocean Region.<sup>137</sup>

The second opening came with Putin's invasion of Ukraine in February 2022. That act pushed up not just oil prices but also food prices because of the threat now posed to the production of grain and fertilizers in Ukraine and their export from Black Sea ports. Like many developing states, India was unsettled by these developments, as well as by Western rebukes of New Delhi's refusal to criticize Putin's actions. In response, before, during, and after the G20 the Modi government positioned itself as a spokesperson for those whose post-COVID economic recoveries and ongoing good security were being undermined by the conflict.<sup>138</sup> Finally, as we have noted, India's turn as chair of the G20 in 2023 itself provided an opportunity to claim leadership for the Global South.

Since the election, however, despite the continued talk of Global South solidarity, India has shown less interest in taking on this role. In August 2024, New Delhi hosted a third virtual Voice summit, but there was little new on the agenda.<sup>139</sup> Moreover, no noticeable uptick has taken place in visits to Global South states—and the trips that have been made can be connected to material interests rather than efforts to build influence. In the past year, for example, Modi and Jaishankar have each been to only three African states. They went together to Namibia and Nigeria, while Modi went on his own to Ghana and Jaishankar to South Africa.<sup>140</sup> They each made one more South American visit—to Argentina, Brazil (twice), and Guyana—but traveled together for all of them. And in these African and South American trips is a clear pattern: Brazil, Ghana, Guyana, Namibia, and Nigeria are all emerging or established energy suppliers.

Of course, Modi and Jaishankar have since the election continued to show a high degree of

interest in developing states in India's neighborhood, with visits to the Maldives, Mauritius, and Sri Lanka. But despite considerable talk of India resuming leadership of the Global South, the evidence suggests that New Delhi's engagement remains both limited and largely driven by vital interests, notably energy security.

## CONCLUSION

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India's travails since the election have prompted a public debate about the strategy pursued by the Modi government since 2014, a strategy that involves the simultaneous engagement of all major powers without being fully aligned with any of them, with the aim of enhancing strategic autonomy.<sup>141</sup> For the first time, thanks to recent turbulence New Delhi has encountered, this approach is being subjected to sustained scrutiny inside and outside India.<sup>142</sup> It is not yet clear, however, just how this debate will play out and what impact it will have on India's foreign policy.

Yet it does seem reasonable to conclude that India's travails over the past year will reshape at least some elements of the Modi government's strategy. New Delhi's approaches to the Trump administration and to Pakistan are the ripest for revision. Given the importance of the US-India strategic partnership for the latter's future security and prosperity, the Modi government will soon need to find some way to stabilize a rapidly deteriorating relationship with the White House. With Pakistan the demand is less acute, but it appears that India's strategy of coercion through partial isolation, nonengagement, and threats is no longer viable, as Islamabad has proven that military escalation can draw third parties into bilateral conflicts and as Pakistan's leaders find renewed favor in Washington, DC. In these areas, and perhaps others, we may well see considerable change in India's foreign policy in the coming months and years.

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