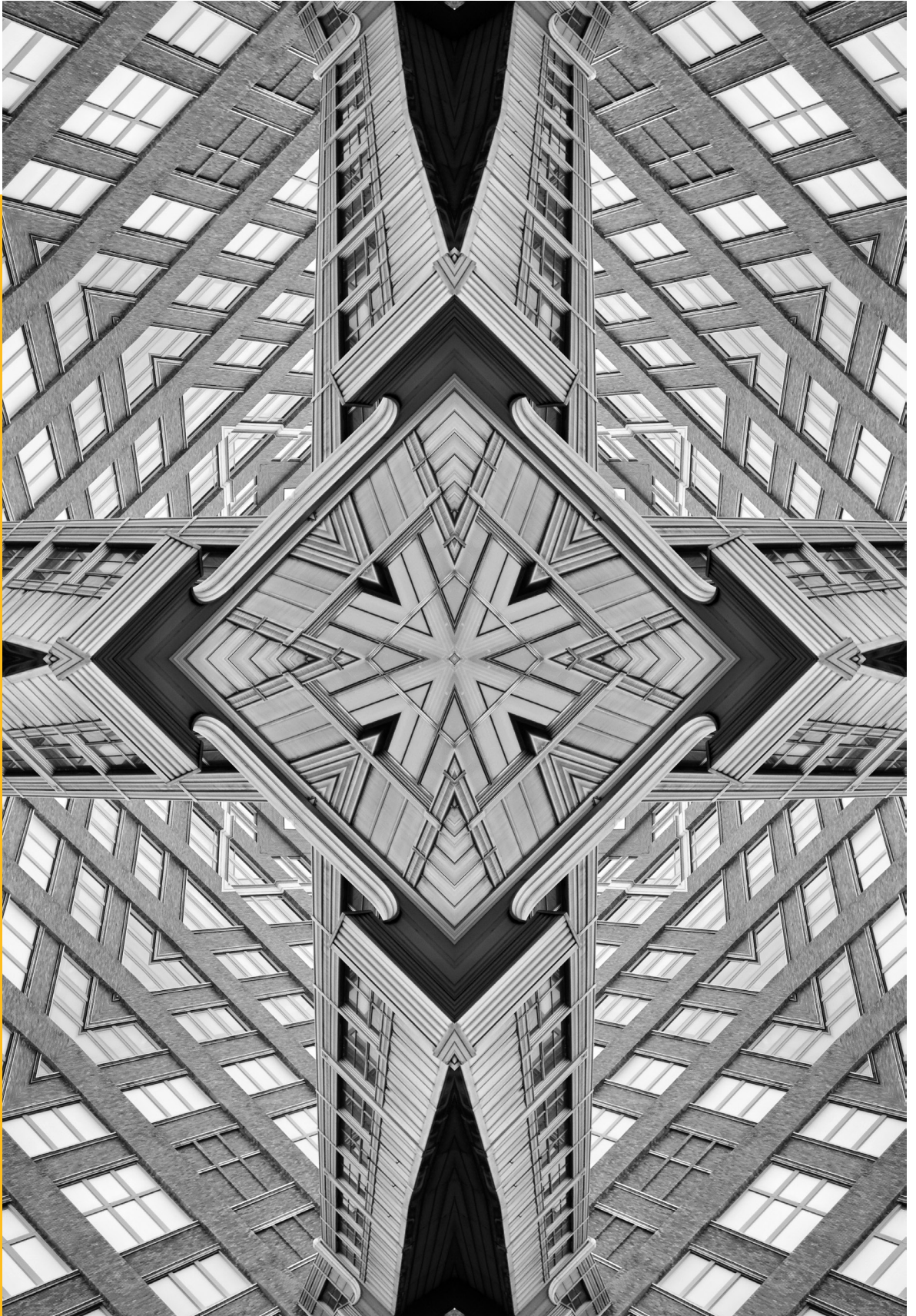


Occasional Paper



ISSUE NO. 464 FEBRUARY 2025

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The India-U.S. Story: Biden's Legacy and Trump 2.0

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Abstract

As United States (US) President Donald Trump took office for a second term in January, a critical assessment of the legacy of the Joe Biden administration may help inform the India-US bilateral relationship. Under President Biden, the bilateral ties between India and the US progressed steadily, gaining momentum through big-ticket sales and reinforced by structural continuities. Bilateral defence relationships were strengthened, and a technology-led framework was instituted, with the choice of systems signalling a tech-driven cooperative intent in the Indo-Pacific. The Initiative on Critical and Emerging Technology also redirected attention to technology and innovation in the bilateral partnership. In Trump's second term, India-US relations are poised for continuity and further consolidation. Trump 2.0 is likely to maintain the momentum in strategic ties, especially in areas like defence cooperation, energy collaboration, and technology sharing, while recalibrating approaches on geoeconomic affairs such as trade, tariffs, and India's contributions to shared security burdens.

With Donald Trump assuming office in the United States (US) in January 2025, questions arise about the direction of his second term, particularly under the Republican trifecta, i.e., control of the presidency and both chambers of Congress, the Senate, and the House of Representatives. Unlike the unsteady support within Congress in 2016, stronger Republican endorsement this time around could enable Trump 2.0 to implement his agenda with fewer legislative roadblocks.

The uncertainties associated with Trump's second term extend to international policies. Trump's approach to alliances and partnerships is expected to diverge from that of his predecessor, Joe Biden. However, in the case of India-US relations, Trump is likely to capitalise on the momentum gained during Biden's tenure in most sectors.

The India-US relationship is framed by shared political systems and mutual interests across sectors like defence, trade, technology, and geopolitics. Under Biden's presidency, the Quad, comprising the US, India, Japan and Australia, gained ground, and in September 2024, the grouping issued the Wilmington Declaration.^a The momentum was reinforced by the Quad Foreign Ministers' Joint Statement¹ issued on 30 December 2024, at the 20th anniversary of the partnership.

Minilateral cooperation was also strengthened through increased working-group exchanges, following a renewal under Trump in 2017.^{b,2} Moreover, the Biden administration has pushed India-US collaboration in critical and emerging technologies—a sector that could be key to the emerging collaboration between NASA (National Aeronautics and Space

a On September 23, 2024, the Quad nations, held their fourth in-person summit in Wilmington, Delaware, hosted by former US President Joe Biden. The Wilmington Declaration reaffirmed their commitment to a free and open Indo-Pacific, emphasising respect for regional institutions like ASEAN, the Pacific Islands Forum, and IORA. Key areas of focus included strengthening maritime security through joint coast guard operations to ensure the security of Asia's vital trade routes, while addressing concerns over coercive actions and the militarisation of disputed territories in the South China Sea. The declaration outlined other key areas of collaboration, including health security, safeguarding Asia's vital trade routes, humanitarian and disaster relief (HADR) efforts, critical and emerging technologies, clean energy, space and cyber security. This summit marked President Joe Biden's final Quad meeting.

b Specifically, the Quad was revived in 2017 during Trump's first Presidential term, a ministerial-level working group.

Administration) and ISRO (Indian Space Research Organisation) on initiatives such as astronaut training.³ Cooperation in critical and emerging technologies could contribute to various aspects of the relationship, such as space policy—likely an area of strong focus under the second Trump administration.

As a strategic partner of the US, India occupies a unique position between partnership and autonomy, particularly considering India's neutral stance on the global stage and the US's calibrated approach to allies and adversaries alike. During Trump's first term, US-India relations were defined by robust defence partnerships, cautious trade negotiations, and a shared strategic interest in counterbalancing China in the Indo-Pacific. Under Trump 2.0, this trajectory is likely to continue and advance their relationship without massive changes, given the nominations to key positions like Secretary of State and National Security Advisor, to name a few, who have demonstrated pro-India and anti-China inclinations.

The US under Trump 2.0 will attempt to reposition itself on geoeconomic issues of trade, tariffs, and India's burden-sharing role in the Indo-Pacific. India's growing influence in multilateral forums, alongside Trump's anti-China, anti-immigration stance and a team that seems bullish on India, sets the stage for a layered yet optimistic future for the bilateral relationship over the next four years.

However, the Trump administration is also likely to demand that India take on greater responsibility in the Indo-Pacific in areas like regional security, humanitarian and disaster relief (HADR) undertakings, and capacity building. With Trump potentially inheriting a more volatile Gulf region, a substantive part of India's Indo-Pacific vision is dependent on the ongoing conflict in the Middle East. If the Trump administration can negotiate an end to the ongoing conflicts in the region, then the India-US joint vision in the Indo-Pacific could expand. A potential advantage of Trump's projected positioning is that India might stand to benefit from supply-chain deflections from the US-China economic competition, which might intensify under Trump's second term.

The India-US partnership has enjoyed bipartisan support across successive administrations in both countries. This alliance became conspicuous following President Bill Clinton's visit to India in 2000, which reset ties and expanded trade and technology collaboration.⁴ The George W. Bush administration took it further with the landmark US-India Civil Nuclear Agreement in 2008,⁵ cementing India's status as a strategic partner and enabling civilian nuclear cooperation. President Barack Obama (2009-2017) built on this foundation and became the first US president to visit India twice during his tenure.⁶ Under his administration, India was declared a Major Defence Partner (MDP) in 2016, streamlining defence trade and technology transfer and facilitating defence manufacturing and logistics.⁷

Table 1 summarises the milestones in the bilateral relationship across party lines in both countries. The Trump administration will inherit the foundation laid by previous administrations, including his own first term.

Table 1: Key Developments in the India-US Partnership (2008-16)

Years	US President	Indian Prime Minister	Milestones
2008-2014	Barack Obama	Manmohan Singh	<ul style="list-style-type: none"> The bilateral civil nuclear cooperation agreement was finalised in July 2007 and signed in October 2008. In 2008, the Nuclear Suppliers Group (NSG) permitted India to engage in nuclear trade for the first time in three decades. In 2010, the U.S.-India Economic and Financial Partnership was launched. The U.S.-India Strategic Dialogue was inaugurated in 2010. In 2011, India and the US signed an MoU to promote cybersecurity cooperation. In 2014, NASA and ISRO partnered on the NASA-ISRO Synthetic Aperture Radar (NISAR) mission^c in September.

^c The NISAR mission is a joint space mission between NASA and ISRO. The mission's launch is scheduled for early 2025.

Years	US President	Indian Prime Minister	Milestones
2014-2016	Barack Obama	Narendra Modi	<ul style="list-style-type: none"> India launched the Global Initiative of Academic Networks (GIAN) in 2015. 1,000 educators from the US would come annually to teach in India. In 2015, a renewed New Framework for India-US Defence Cooperation for the next 10 years was released. In 2015, the first India-US Strategic and Commercial Dialogue was held. In 2016, the two elevated ties to a Major Defence Partnership (MDP).^d In 2016, the 'Logistics Exchange Memorandum of Agreement' was signed.

Trump 1.0 (2017-2020)

While the bilateral relationship between India and the US may not have peaked during Trump's visit to India in 2020, it nevertheless yielded an essential maritime defence deal for the 24 MH-60R Seahawk anti-submarine warfare helicopters.⁸ During Trump's first term, the US renamed its Pacific Command to the Indo-Pacific Command⁹ and promoted the Quad as a multinational strategic partnership. While pursuing a more isolationist approach by withdrawing from a number of multinational agreements, Trump remained tethered to the Indo-Pacific, positioning India as a key player in balancing regional security dynamics. He also established the 2+2 Ministerial Dialogue, which facilitated joint defence dialogue and agreements like the Communications Compatibility Security Agreement (COMCASA)¹⁰ and the Industrial Security Annex (ISA).¹¹ The ISA was signed as an extension of the General Security of Military Information Agreement (GSOMIA),¹² initially signed in 2002, thus allowing the Indian military to use high-end secure and encrypted American communication equipment.

^d Although the promise of the MDP may not have fully materialised in concrete deliverables, the agreement nonetheless provides a framework and institutional support for the bilateral relationship between the US and India.

Trump inherited the Obama administration's policy that had declared India as an MDP of the US. During the first Trump administration, defence trade reached US\$18 billion in 2020,¹³ although trade in other sectors faltered.¹⁴ India's status as a 'special trading partner' under the General System of Preferences (GSP) was revoked¹⁵ in 2019 due to concerns over a lack of reciprocal market access for the US. In response, India imposed retaliatory tariffs on US exports,¹⁶ which hampered trade between the two sides. There is also no Free Trade Agreement (FTA) between India and the US due to India's removal from the GSP. However, before Trump was voted out of office in 2020, he signed the historic Basic Exchange and Cooperation Agreement (BECA)¹⁷ with India, building on the other three strategic and logistics agreements signed between the two countries, namely, the Logistics Exchange Memorandum of Agreement (LEMOA),¹⁸ COMCASA, and GSOMIA.

The bilateral trade between India and the US has been marked by increasing cooperation and mutual benefits; in FY2024, the US was India's second largest trading partner after China, with trade valued at US\$118.3 billion.¹⁹ However, there are also occasional challenges, which might intensify during Trump's second term.

Trump's economic rhetoric, often termed as "Trumponomics",²⁰ emphasises a protectionist "America First" policy that aims to boost the value of local products in the US, impose tariffs on foreign countries, and create more American jobs. Trump's intention to restructure the American economy through deportations (and, in turn, solve the affordable housing crisis) also falls within the scope of Trumponomics. Despite these protectionist undertones, Trump's first term coincided with augmented defence collaboration between India and the US through increased convergence over China as a common challenge threat, pushing the two countries to mitigate challenges in situational and domain awareness capabilities near the Line of Actual Control (LAC) and the Indian Ocean.²¹ In 2020, New Delhi and Washington pledged greater maritime and space cooperation, intelligence sharing, and joint military exercises while condemning extremism and elevating the countries' relationship to a 'Global and Strategic Partnership'.²² For instance, in the 'Yangtze Incident of 2022', the Indian military was able to thwart a Chinese military

incursion along the LAC as a result of real-time details provided by the US government in the fastest-ever intelligence sharing between the two countries. This set a precedent for how intelligence sharing between Delhi and Washington can be made more robust and real-time.²³

During Trump's first term, India continued to contribute to maintaining a peaceful Indo-Pacific, resulting in increased defence exports from the US to India.²⁴

Table 2: Defence Deals and Bilateral Agreements (2017-2020)

Fiscal Year (FY)	Total Bilateral Trade (US\$ Bn)	Major Bilateral Agreements / Defence Deals
2017-18	126.18	<ul style="list-style-type: none"> India moved into US Department of Commerce Strategic Trade Authorization-1 (STA-1) status Logistics Exchange Memorandum of Agreement (LEMOA) (signed in 2016, implemented in 2017)
2018-19	142.64	<ul style="list-style-type: none"> Communications Compatibility and Security Agreement (COMCASA) Launch of 2+2 ministerial dialogue The US renamed its Pacific Command to Indo-Pacific Command
2019-20	148.8	<ul style="list-style-type: none"> India procured 72,400 SIG-716 assault rifles in an INR 700 crore deal with Sig Sauer of the US Industrial Security Annex to facilitate the exchange of classified information and manufacture military platforms between the defence industries of both countries, including fighter jets.
2020-21	121.77	<ul style="list-style-type: none"> Basic Exchange and Cooperation Agreement (BECA) India procured 24 MH-60R Seahawk maritime helicopters from the US-based Lockheed Martin group for US\$2.6 billion

Source: US-India Strategic Partnership Forum;²⁵ US Trade Representative²⁶

Biden's Legacy (2021-2024)

Throughout his term, Biden emphasised Artificial Intelligence (AI) and emerging technologies towards improving bilateral defence ties, boosting multilateral geoeconomic agendas, and managing China.

Under Biden, Indian exports to the US reached an all-time high in FY2023, with overall trade estimated at US\$128.55 billion,²⁷ making the US India's largest trading partner. The bilateral trade surpassed US\$72 billion in the first half of 2024 and is predicted to surpass the previous year's record by the end of FY2024.²⁸ In 2022, India-US trade experienced a 17-percent hike from the previous year, at US\$119 billion. The India-US Strategic Trade Dialogue (IUSSTD)²⁹ was established in 2021 to enhance trade collaborations in space, technology, semiconductors, and defence, with the inaugural meeting held in Washington, DC, in June 2023.

Biden continued the momentum in bilateral defence deals with India established during Trump's first term, notably by signing the MQ9B predator drone deal.³⁰ Under Biden, India and the US also signed the Security of Supply Arrangement (SOSA) to strengthen bilateral defence cooperation by prioritising the supply of defence equipment between the two nations³¹ with the aim of strengthening the US-India Defence Technology and Trade Initiative (DTTI).³²

However, the impact of SOSA will be considered incomplete without the conclusion of the ongoing negotiations of the Reciprocal Defense Procurement (RDP) agreement. This agreement will provide India with open-market access to the US defence sector by adding India to the list of 26 other countries compliant under Defense Federal Acquisition Regulation Supplement (DFARS),³³ which qualifies them to fulfil significant American military orders and be exempt from the constrictions of the 'Buy American' rhetoric.

A number of new deals and technology partnerships were initiated during Biden's and Modi's administrations. In 2023, India and the US agreed to co-produce General Electric's F414 jet engines, augmenting the operations of

India's light combat aircraft Tejas.^e Hindustan Aeronautics Limited (HAL) and GE Aerospace are set to co-produce 99 F414 engines in India, with initial deliveries from GE and subsequent units manufactured domestically under a transfer-of-technology agreement.³⁴

During Modi's Washington visit in June 2023, the India-US Defence Acceleration Ecosystem (INDUS-X) was set up as part of the countries' Initiative on Critical and Emerging Technologies (iCET), which was launched in January 2023.³⁵ INDUS-X aims to advance defence innovation and warfighting capabilities between both nations,³⁶ whereas iCET aims to expand the strategic partnership between India and the US, serving as an umbrella framework for innovation collaboration across domains such as space (e.g., NASA-ISRO collaborations), science and technology (e.g., Indo-US Quantum Coordination Mechanism), security, and defence.³⁷ A notable collaboration under iCET is a joint task force between the US Semiconductor Industry Association (SIA) and the India Electronics Semiconductor Association (IESA) for developing semiconductor ecosystems.³⁸

Table 3: Defence Deals and Bilateral Agreements (2021-2024)

Fiscal Year (FY)	Total Bilateral Trade (US\$ Bn)	Key Bilateral Agreements / Defence Deals
2021-22	160.52	<ul style="list-style-type: none"> Launch of the India-US Climate and Clean Energy Agenda 2030 Partnership The US joined the International Solar Alliance in 2021 US-India Low Emission Gas Task Force (LEGTF) I2U2 was founded Launch of the US-India Artificial Intelligence (USIAI) initiative

^e GE414 is used in both MK1 and MK2 versions of LCA Tejas.

Bipartisan Legacy

Fiscal Year (FY)	Total Bilateral Trade (US\$ Bn)	Key Bilateral Agreements / Defence Deals
2022-23	191.18	<ul style="list-style-type: none"> India joined the Indo-Pacific Economic Framework (IPEF) MoU signed between IIT (Indian Institutes of Technology) Council and AAU (Association of American Universities) for research on sustainable energy, semiconductor technology, AI, and quantum science
2023-24	128.78	<ul style="list-style-type: none"> Launch of the US-India Renewable Energy Technology Action Platform (RETAP) Launch of the Initiative for Critical and Emerging Technology (iCET) India-US Working Group on Education and Skill Development (WGESD) launched INDUS-X (India-United States Defence Acceleration Ecosystem) launched India-US Strategic Trade Dialogue (IUSSTD) established India became the 27th nation to sign the Artemis Accords for outer-space exploration
2024 (till September)	118.3	<ul style="list-style-type: none"> ISRO and NASA signed an internal agreement for a strategic framework for cooperation in human spaceflight Signed the 'Cultural Property Agreement' Signed a deal with General Atomics to acquire 31 armed MQ9B Sea Guardian and Sky Guardian UAV drones, worth US\$3.5 billion Signed the Security of Supply Arrangement (SOSA) MoU on the assignment of liaison officers Innovation for Defense Excellence Agreement (iDEX) Cultural Property Agreement signed in July US approved the sale of High-Altitude Anti-Submarine Warfare (HAASW), a US\$52.8 million deal

Sources: Indian Ministry of External Affairs (2022-23, 2023-24),³⁹ Indian Embassy, US⁴⁰

Bracing for a Bumpy Ride

While Republicans have historically viewed India more favourably than Democrats, the past two decades have bridged this perception gap. There is increased bipartisan concurrence on India's role in the Indo-Pacific, particularly in counterbalancing China's growing influence. While both the Republicans and Democrats have adopted a building-block strategy for countering China,⁴¹ with India positioned as a key partner, the difference in their approaches persists: Trump's unilateral approach⁴² to the Indo-Pacific policy centred on the idea that other countries should do more and that the US should be looking at its own interests; this perception is likely to intensify in his second term. For its part, the Biden administration was open to investing in multilateral strategic partnerships⁴³ towards enhanced ties with partners and friends and reassuring ties with allies.

The second Trump administration's strategic focus on ending global wars has an underlying priority of addressing the China question. The competition with China could compel the US to work with its partners. As India positions itself as the primary partner to a Trump 2.0 administration in countering China, factors such as the resetting of Indo-Chinese relations in October 2024^{f,44} must be considered. Despite de-escalation efforts along the LAC, particularly in Depsang and Demchok, distrust and the border dispute persist.⁴⁵ It is essential to reiterate that this agreement does not mark the beginning of a "friendship" between India and China. As the only Quad member sharing a land border with China—and one that has experienced repeated incursions by the latter⁴⁶—India will have to continue engaging with China on border agreements. India continues to act as a counterweight to China, just as China remains a hegemonic and expansionist challenge to India and its allies.

While India's stance against China remains firm, there is uncertainty regarding the approach that a second Trump administration might adopt toward China. The attendance of Chinese Vice President Han Zheng in Trump's swearing-in ceremony⁴⁷ could signal a shift in policy, especially

^f In late October 2024, India and China made a significant move to de-escalate their border dispute along the Line of Actual Control (LAC), their longstanding, loosely defined boundary. The two countries announced they would pull troops back, dismantle temporary infrastructure, and resume pre-2020 patrols in contested areas like Depsang and Demchok in eastern Ladakh.

given that no Chinese official was invited to his first inauguration in 2017. This change in diplomatic gesture underscores the unpredictability of future US-China relations under Trump 2.0. In the case of India-US relations, structural formats act as a buffer against abrupt shifts in bilateral relations. However, Trump may shift priorities or strategies within groups and formats such as the Quad and 2+2 in ways that benefit the US's standing in the region.

For India, its own strategic autonomy will give it an advantage over US allies in navigating relationships with Washington. As the Trump 2.0 administration gets underway, another factor likely to guardrail the bilateral is the Modi-Trump bond.⁴⁸

Trump's Secretary of State Marco Rubio and National Security Advisor Mike Waltz have consistently voiced support for stronger India-US ties and a firm stance on China and Pakistan.⁴⁹ Considering Trump's own adversarial stance on China, he will likely reinforce Biden's Indo-Pacific strategy, albeit with a different approach. For instance, Trump might focus on practical steps that regional partners can take in countering China. He may also show interest in the Indian Ocean Strategic Review Act,⁵⁰ which received little attention during the Biden administration, as it emphasises regional governance through cooperation with partners in the Indo-Pacific region, especially India. Depending on how the US-China competition evolves, India should brace for increased pressure to take a firmer stance against China, with a stronger emphasis on military readiness.

During the Biden administration, in 2022, India joined the US-led Combined Maritime Forces (CMF)⁵¹ in Bahrain, which marked a notable development in India's maritime defence strategy and an opportunity to upgrade India-US interoperability in a critical geography of the Indo-Pacific. Increased joint exercises and operations⁵² imply growing cooperation and alignment of strategic interests. However, despite repeated requests from the US, India has refused to join the US-led Operation Prosperity Guardian, aimed at countering Houthi attacks in the Red Sea, due to concerns about being drawn into Washington's regional interests.⁵³

Trump is expected to sustain the momentum in the Indo-US maritime partnership, emphasising the shared goals of countering China's expanding influence in the Indo-Pacific. His administration may build on the foundation that was set during his first term by increasing the scope of the Quad through renewed joint naval exercises like MALABAR⁵⁴ and agreements such as the Basic Exchange and Cooperation Agreement (BECA).⁵⁵ Considering the size of the Chinese Navy, which has an estimated 370 ships, making it the largest fleet,⁵⁶ Trump could advocate for enhanced naval cooperation with India to counterbalance China's growing maritime influence in the Indo-Pacific. However, India's neutral stance in the Middle East conflict⁵⁷ and its energy dependence on the region⁵⁸ could make it hesitant to engage directly in US-led operations.

On the trade front, Trump 2.0 is expected to adopt a non-conciliatory approach towards addressing part of India's US\$35.3-billion trade surplus over the US.⁵⁹ With New Delhi projected to spend at least US\$200 billion⁶⁰ in the coming decade to modernise its armed forces, Trump's focus on strengthening US exports could see his administration pushing India to address the imbalance by committing to big-ticket arms purchases. India was the world's largest arms importer in 2019-23, accounting for a 9.8-percent⁶¹ share of global imports, with 13 percent of India's total arms imports from the US; therefore, defence trade stands out as a critical area for balancing the scales. However, it remains to be seen how India balances its domestic defence manufacturing vision of *Atmanirbharta*⁶² under the 'Make in India' initiative amidst pressures from one of its strongest strategic partners; achieving such a balance is not without precedent.

Critical Sectors

By increasing US tariffs on imports, emerging economies face heightened trade barriers, reducing capital inflows. With fewer investments, these economies will struggle to balance their trade, as imports surpass exports. This growing deficit would weaken their currency value. Ultimately, while Trumponomics aims to strengthen the US economy, it often leaves other nations struggling to achieve economic stability.

Trumponomics has three pillars: corporate tax cuts, deregulation, and immigration policies rooted in augmenting domestic growth with a knock-on effect on affordable housing and job growth. The tax cuts and deregulation are designed to enforce onshoring back to the US by creating a more business-friendly environment and incentivising companies to prioritise American markets. Under the second Trump administration, onshoring efforts could indirectly impact India by increasing competition for foreign investments. Trump's 'Buy American, Hire American'⁶³ rhetoric highlighted his focus on immigration reform by seeking to redirect outsourced jobs to domestic hires, which has direct implications for the Indian workforce. Furthermore, during his presidential campaign, Trump claimed that his trade policy would "completely eliminate" US dependency on China by revoking its 'most favoured nation' trade status.⁶⁴ Given his Cabinet choices and business interests, India emerges as the next best alternative due to its skilled workforce and geoeconomics and strategic linkages to the Indo-Pacific.⁶⁵ Despite earlier trade animosity with "tariff king"⁶⁶ Modi, Trump's priorities appear to have shifted in his second term, indicated by his reluctance to bracket India with China during much of his campaign. This aligns with India's narrative of being unconcerned about Trump 2.0.⁶⁷

However, two points of concern for India emerge with Trump's 'China Plus One' or C+1 strategy.⁶⁸ The Trump 2.0 administration's possible imposition of 60 percent tariffs on China could create supply chain disruptions. It remains to be seen whether India can effectively meet US trade demands and pose as a viable alternative to China, absorbing the impact of potential disruptions. The other factor is the characteristic uncertainty associated with Trump and whether Trump will impose such a high tariff on China at all, with Trump's recent phone call with Xi Jinping indicating a moderation in the former's tariff stance.^{g,69}

Immigration

Immigration remains one of the most contentious and multi-layered issues in the US, with bipartisan acknowledgement of its significance but deep divisions on how to address it. While Biden advocated for pathways to

g After a phone call with the Chinese leader, Trump stated that he believed the two countries could reach a trade deal, adding that the two could "expect to solve many problems together." Subsequently, Trump has oscillated between imposing 10 percent tariffs on Chinese good, to not doing so at all.

citizenship for illegal immigrants through the protection of the Deferred Action for Childhood Arrivals (DACA) programme⁷⁰ and other initiatives aimed at keeping families together,⁷¹ Trump is known to prefer protectionist, localised, and securitised approaches on all fronts, including immigration. Although Trump has not objected to international students entering the US,⁷² his Cabinet picks, Stephen Miller and Tom Homan,⁷³ who support tightened H1B restrictions, can pose risks for the Indian skilled workforce, especially considering that more than 70 percent⁷⁴ of the total allotted H1B visas in 2023 were issued to Indians. The rising number of illegal Indian immigrants in the US, estimated at nearly 725,000 as of this year, further complicates this issue.⁷⁵

Trump 2.0 is set to have a stronger domestic pull on the issue of immigration, and it is likely that Trump will pick up where he left off^{h,76} in his previous term. Recent debates within the US have signalled a growing divide within the Republican Party between the meritocracy faction and the MAGA ('Make America Great Again') faction. While the former has the support of Trump nominees like Elon Musk and Vivek Ramaswamy, who are themselves descendants of immigrants, the MAGA faction considers the H1B to be excessively benefiting Indians.⁷⁷

India's response could centre around diplomatic engagements with the US on the issue and conversations to safeguard H1B opportunities for Indians. It could simultaneously create domestic opportunities through initiatives such as 'Make in India' and 'Digital India' to absorb talent deflections from the US. India could explore alternative destinations for skilled workers and focus on upskilling the workforce to align with global demands.

^h Notable immigration policies were implemented during his first term, including the construction of a wall along the US-Mexico border, which was part of a broader "America First" immigration policy aimed at reducing illegal immigration and drug trafficking. Further, in 2018, the Trump administration enacted a "zero tolerance" policy, which led to the separation of families who crossed the US-Mexico border illegally. The administration also enacted the "Remain in Mexico" policy in 2019, which required asylum seekers to stay in Mexico while awaiting their immigration hearings in the US. Trump also sought to end 'Temporary Protected Status' (TPS) for nationals from countries including El Salvador, Haiti, and Honduras. TPS is granted to individuals from countries affected by conflict or natural disasters, allowing them to live and work in the US temporarily. Lastly, he significantly reduced the number of refugees allowed into the US during his first term.

Climate and Energy

Under the Biden administration, climate change was central to India-US cooperation, exemplified by initiatives like the US-India Climate and Clean Energy Agenda 2030 Partnership, which targets installing 450 GW of renewable energy capacity in India by 2030.⁷⁸ Joint efforts such as the Green Hydrogen Task Force⁷⁹ have also highlighted India's role in advancing global decarbonisation efforts. Trump's return to office may disrupt this trajectory. His first term saw the US exit the Paris Agreement,⁸⁰ which Trump criticised as "unfair"⁸¹ to American interests. His opposition to emissions regulations and focus on fossil fuel investments suggest a shift from green energy.⁸² Given Trump's promise to end Biden's "Green New Scam",⁸³ it is safe to assume that a transactional approach could lead to a renegotiation or even a dismantling of the US's bilateral and multilateral green agreements that are perceived as unequal. This would not only affect US commitments to climate action and the Sustainable Development Goals (SDGs) but also increase the pressure on big emitters like India.

In energy production, Trump's campaign reiterated the "drill baby drill" mantra, promising Americans lowered gas prices by increasing both onshore and offshore drilling and fracking.⁸⁴ Trump is expected to pass the proposed Energy Re-permitting Reform Act of 2024,⁸⁵ which aims to fast-track energy projects, thus enhancing American energy independence.⁸⁶ With the US projected to account for 40 percent of the new Liquefied Natural Gas (LNG) export capacity by the latter half of this decade,⁸⁷ along with its spending on fossil fuel supply already surpassing 19 percent of the global total, the country is positioned to strengthen its global market share.

For India, a strengthening US energy market may be a double-edged sword. In principle, increased US energy exports could help India diversify its energy supply, reducing dependency on Middle Eastern oil or Russian resources. However, Trump 2.0 may use the energy sector to address the US trade deficit, increasing pressure on India to import more US energy to placate Trump. Such long-term fossil-fuel agreements could, in turn, jeopardise India's renewable energy goals and commitment. Perhaps most importantly for India, pricing will dominate its energy trade internationally, and the Trump administration may not be able to enter competitive pricing with Russia.

Space Partnerships

The co-advancement in space and technology for the US and India is likely to stay its course.⁸⁸ The second Trump administration may prioritise defence-oriented partnerships while encouraging private-sector investments and satellite-surveillance collaboration. However, Elon Musk's involvement in Trump 2.0 may lead to an increased role of private players in the space sector. Given recent Indian scepticism toward Musk's Starlink services⁸⁹—especially concerns about its adherence to India's security guidelines—tensions may arise if Musk's policies conflict with established agreements or security protocols in India.

China

Biden's approach to China was characterised by strategic convenience. While he retained the tariffs imposed by his predecessor,⁹⁰ his administration emphasised multilateralism to counter China's influence, highlighted by initiatives like the Indo-Pacific Economic Framework (IPEF)⁹¹ and collaboration through the Quad. The Biden administration maintained the importance of investing in American technology and infrastructure to compete with China and took steps to restrict US investment in critical Chinese industries,⁹² such as advanced computing and artificial intelligence. Biden also introduced the CHIPS and Science Act⁹³ to reduce the reliance on Chinese semiconductor supply chains and invested heavily in 'friend-shoring' to diversify trade partners, which inadvertently brought India and the US closer⁹⁴ due to their mutual interests in limiting Chinese domination in the sector. However, Biden also pursued open communication with Beijing when required, to promote coordination and manage economic decoupling without destabilising the global economy. This sentiment was reflected in former Secretary of State Antony Blinken's statement that the US's relationship with China will be "competitive when it should be, collaborative when it can be, and adversarial when it must be."⁹⁵

America's China policy may take a sharp turn during Trump 2.0, with National Security Advisor Mike Waltz and Secretary of State Marco Rubio both being China critics and pro-India. Rubio has sponsored the Uyghur Forced Labor Prevention Act,⁹⁶ making it harder for China to import goods made by the Uyghur minority.⁹⁷ He has also advocated for restricting official Chinese visits to the US and proposed the Hong Kong Human Rights and Democracy Act,^{i,98} criticising Beijing for violating Hong Kong's autonomy and repressing the population's religious sentiments.⁹⁹ Rubio has called China "the threat that will define this century."¹⁰⁰ In 2021, Rubio was at the forefront of the Secure Equipment Act—a law preventing the government

i The law, passed in October 2019, addresses Hong Kong's status under US law and imposes sanctions on those responsible for human rights violations in Hong Kong. The law provides for sanctions, including visa bans and asset freezes against individuals or entities involved in suppressing Hong Kong's autonomy. It also calls for an annual review of Hong Kong's special trading status with the US, based on its level of autonomy from China.

from issuing new equipment licences to Chinese companies, including ZTE and Huawei, “which allow Beijing to spy on American citizens.”¹⁰¹ Rubio sees Washington’s competition with Beijing as a zero-sum game. He has simultaneously advocated for a deeper US-India partnership. In the context of the US-India Defense Cooperation Act, he stated that India should be treated similarly as other American allies such as Japan and South Korea. He has also acknowledged India’s increasing border threats from China in the Himalayas and the Indian Ocean and from “Pakistan-sponsored” terrorist undertakings.¹⁰²

Waltz also holds a similar stance on China, having advocated for the 2021 Winter Olympics to be moved out of China. During the COVID-19 pandemic, he called the Chinese Communist Party (CCP) “irresponsible” for silencing doctors and journalists and held China guilty of human rights violations.¹⁰³ He has also spoken against the “mass infiltration and theft of American research” at US colleges and universities by Chinese students. Waltz also serves as a member of the House Task Force on China—a group that works on recommendations to counter Beijing in several domains.¹⁰⁴

Waltz, too, has emphasised the importance of enhancing India-US trade relations, which could play a key role in establishing more secure supply chains between the two nations. This initiative has gained momentum during the past two American administrations and is expected to continue under Trump 2.0. However, he has also suggested establishing a formal military alliance with India. India’s unwillingness to be bound by alliances notwithstanding, this proposal reflects the US’s willingness to extend greater solidarity to India, particularly as part of an alliance against China. India is unlikely to engage in military confrontations with China, but building robust deterrence in partnership with the US may receive further impetus under Trump 2.0. In the US’s grand design to counter China, India still emerges as a natural key player in the Indo-Pacific, being a democratic power in the region that is not expansionist. Given the economic ties between China and the US,¹⁰⁵ Trump could seek to diversify trade with India and be relatively concessionary with India in imposing tariffs, especially as, in the short term, higher tariffs are expected to slow down China’s export industry, providing India with a competitive edge.

Russia

During Trump's first term, his administration maintained an ambiguous policy towards Russia. This approach was shaped by Trump's closed-door meetings with Putin and speculations about Russia's potential role in Trump's 2016 election victory.¹⁰⁶ Trump's Russia policy was a mix of cooperation with Putin while simultaneously upholding the Obama administration's sanctions on Moscow.

Following the eruption of the Russia-Ukraine war in February 2022, just over a year into Biden's presidency, Biden almost immediately reinforced Washington's support for Kyiv. Since then, the US has supplied US\$175 billion in direct military aid to Ukraine. In 2024, the US allocated US\$61.3 billion to support Ukraine—the largest budget for the war to date, in addition to assistance and training provided by most North Atlantic Treaty Organisation (NATO) members.¹⁰⁷ As of November 2024, following Putin's deployment of North Korean troops on the frontlines, Biden authorised Kyiv to use US-supplied long-range missiles to target the forces in Russia's Kursk region.¹⁰⁸ In response, Putin issued a stark warning to the West, threatening the deployment of the Oreshnik medium-range missiles against Europe. Russia subsequently tested the Oreshnik missiles on the Ukrainian city of Dnipro, suggesting that Oreshnik's performance surpassed the Western-supplied Inter-Continental Ballistic Missiles (ICBM). Biden's decision to sustain support for Ukraine marks a departure from Trump's pledge to bring the conflict to an end, complicating the latter's scope of negotiating a cohesive agreement with Russia.

Unlike the Biden administration, Trump's isolationist tendencies may favour India's continued ties with Russia.¹⁰⁹ As Russia remains India's top crude oil supplier¹¹⁰ and the trade between the two is predicted to reach US\$100 billion in this decade,¹¹¹ Trump may find a way for this relationship to benefit both India and the US,¹¹² considering India's strategic importance and the US's long-term vision for the Indo-Pacific. Given that economic recovery and reducing inflation are among Trump's priorities in his second term, he is unlikely to impose across-the-board sanctions on India. The US

relies on imports of refined petroleum from India, and this oil is sourced by India from Russia,¹¹³ making such sanctions counterproductive to the interests of both countries. Delhi's strategic autonomy, independent of its relations with Russia,¹¹⁴ could likely bolster India's trade engagements with Russia, including through the International North-South Transport Corridor (INSTC), and advance its broader economic aspirations in the region.

As Eastern Europe remains mired in the war between Russia and Ukraine, India been viewed, in some quarters, as a potential bridge between the two warring parties.¹¹⁵ However, whether New Delhi is willing to engage with the Russo-Ukraine war as a consolidator remains to be seen.

Trump's responses to the US's competition with China, especially in the context of a strengthening China-Russia axis, are uncertain. Russia has been China's primary defence partner for 75 years, with Xi and Putin recently declaring "their partnership has no limits".¹¹⁶ While China's 12-point peace plan¹¹⁷ on the Ukraine war indicates its "neutral" stance, China's defence exports to Moscow tell a different story. Chinese trade with Russia amounted to US\$240 billion in 2023, with a large portion involving defence equipment,¹¹⁸ including submarines, missiles, sensitive and dual-use technologies,¹¹⁹ and critical components worth more than US\$22 billion.¹²⁰ China accounted for nearly 90 percent of Russia's imports in 2024.¹²¹ The surge in Chinese exports to Moscow since the commencement of the war in 2021 has fuelled the largest expansion of Russia's defence industry since the Soviet era.¹²² China's defence supplies have been directly poured into Russia's war with Ukraine, such as the Garpiya long-range drone series¹²³ sanctioned by the Biden administration in October 2024.

China has also worked through the tide of sanctions from the US¹²⁴ and Europe¹²⁵ by supplying the sanctioned goods to Russia, maintaining its strong position in the global supply chain.¹²⁶ Subsequently, China and Russia have pledged to further deepen ties—reflecting an effort from Beijing to cope with Trump's tariff war.¹²⁷ Putin and Xi have reiterated that this Eurasian defence axis is an effort to counter America's "Cold War mindset", where the US has been attempting to expand NATO increasingly towards Eastern Europe.¹²⁸ Therefore, the looming question

for the incoming Trump administration is whether the US will adopt an isolationist policy towards this axis and the European Union's (EU) growing defence turmoil or opt to re-implement a containment policy towards this challenging competitive axis.¹²⁹ Therefore, improving ties with Russia would support Trump's agenda to end the Russia-Ukraine conflict while creating an opportunity to weaken the Russia-China axis.

Yet another externality is how much appetite Trump will have to align the US's policies with Europe in tackling competition with China and Russia. As Germany's coalition government collapses¹³⁰ and France passes a no-confidence vote against Macron's government,¹³¹ Europe's defence insecurity and expectations from Trump 2.0 have increased.¹³² With a rapidly growing Chinese-Russo defence axis, NATO and Europe face increased pressure, which is reinforced by Trump's insistence on distancing from them and the threat to withdraw aid from Ukraine.¹³³ As Europe's insistence on "winning the war" in Ukraine and reluctance to move closer to China puts it at a dearth of allies, it could increasingly look towards India for a more active defence partnership, especially as the India-Middle East-Europe Corridor (IMEEC) materialises.¹³⁴

Middle East

In the final months of Biden's term, Israel initiated ceasefire negotiations with Lebanon, which came into effect on 27 November 2024. A key condition of the agreement requires the Lebanese army to dismantle non-state military infrastructure to prevent Hezbollah's rearmament while allowing Israel the freedom to respond if Hezbollah poses another threat. Despite these conditions, the ceasefire is expected to foster lasting peace between the two parties. This development marks a positive shift in Biden's Middle East legacy, which appeared uncertain in October when Israel targeted both Lebanon and Iran.¹³⁵ Meanwhile, as Hamas signals its readiness to negotiate a ceasefire with Netanyahu, his attention seems to be increasingly shifting towards Iran as Khamenei is keen on strong retaliation against Tel Aviv.¹³⁶ Moreover, while Biden seems to have a long-term strategic interest in Syria, Trump wants to let the situation in Syria play out for itself.¹³⁷

Trump's first administration achieved progress in normalising Israel's relations with key Middle Eastern states through the Abraham Accords,¹³⁸ and his second term is likely to emphasise upholding the Accords and adopt a "peace through strength" approach towards the Middle East.¹³⁹ Trump is also keen on resolving the Middle East conflict so that his administration can "finally focus on countering the greater threat from the Communist Party".¹⁴⁰ Trump's isolationist policy emerges from a financial rather than ideological stance, implying that war comes with great costs, which lead to debt and inflation;¹⁴¹ therefore, ending the Middle East wars would cater to his economic agenda. Trump has also supported the idea of attacking Iranian oil fields. Although this could be perceived as a decision aimed at escalating Israel's war on Iran, it is merely an aspect of Trump's realpolitik-inspired isolationist policy towards the Middle East, aimed at terminating the Iran issue.

Trump's Israel policy demonstrates a clear contrast to the Biden administration's ambiguous stance on Netanyahu's decisions, as Trump's support for Israel is likely to be focused solely on achieving an immediate end to the war. Trump's approach could result in either a peaceful negotiation between Tehran and Tel Aviv or escalated attacks aimed at overpowering the former. Donald Trump's nominee for US ambassador to Israel, Mike Huckabee, has signalled his intent to continue Trump's Israel policy. Although Trump is pro-Israel, the Israeli far-right expects that Trump will help forward their agenda to annex the West Bank. After Trump's win, Netanyahu appointed a hardliner settler, Yechiel Leiter,¹⁴² as Israel's envoy to the US. However, Netanyahu's ambitions in this regard may be overly optimistic.

If Trump targets Iranian oil fields, oil production in West Asia would be inevitably jeopardised, as Iran remains a major contributor to the global oil supply.¹⁴³ While there are no recent official reports of India importing oil from Iran due to sanctions, such an attack could spike global crude oil prices, leading to an inflation of petroleum prices in India. India's involvement in the Middle East seems solely business-oriented, with the India-Middle East-Europe Corridor (IMEEC) set to elevate maritime trade in the region.¹⁴⁴ However, the construction of the corridor has stalled due to Israel's war with Hamas, Hezbollah, and Iran. As the Trump administration

strives to end the war, the construction will likely progress. The corridor also presents an opportunity for the US to invest in this project. For India, this project holds strategic importance as a countermeasure against China's recent regional strides. Concerning Iran, continued attacks could impact the Chabahar Port and broader regional connectivity.


Trump could encourage India to play a more active role in the Middle East, moving beyond its traditional stance as merely an economic partner to the US. While India may be open to further collaboration with the US on economic undertakings in the region, deeper strategic involvement might be viewed as excessive, given its focus on preserving strategic autonomy and reluctance to become entangled in regional instability. Any pressure from the US to involve India deeper in a strategic game in the Middle East is unlikely to succeed. Historically, India has not been keen to engage with the Middle East beyond a geoeconomic mandate, and this is likely to remain its future approach.

The global order has transformed since Trump's first term in office, marked by an intensifying Russia-Ukraine war¹⁴⁵ and escalating conflicts in the Middle East. These crises have highlighted the complexity of global power dynamics and reinforced the centrality of great-power competition in US foreign policy. However, Trump's Cabinet picks, comprising loyalists like Marco Rubio, Mike Waltz, and Stephen Homan, reflect a conservative shift in priorities for the new administration. Under Trump 2.0, while traditional metrics like military strength and economic dominance will remain critical, new dimensions like technology, supply chains, energy, rare-earth minerals, cyber capabilities, space, and uncrewed systems are expected to become more prominent. China leads the US in several of these domains, particularly as the world enters what Biden referred to as the "decisive decade".¹⁴⁶ Currently, China's economy is growing faster than that of the US, the largest marine capacity in the world,¹⁴⁷ and faster technological innovation, including high-speed rail networks, supercomputers,¹⁴⁸ and green technology.¹⁴⁹ Further, China has navigated the wave of sanctions imposed on it by Washington by maintaining a supply chain with Russia, the Middle East, and North Korea,¹⁵⁰ along with generating billions through its Belt and Road Initiative. With Trump positioned to repeat history through a 'tariff war' with China, the latter prepares to propose new trade policies to offset the impact of tariffs and counter it through the growing pace of its already steep global trade contribution and its readiness to create a self-reliant economic model.¹⁵¹

The Trump and Biden administrations represent two divergent approaches to US foreign policy. Trump's unilateralism, protectionism, and aggressive posturing contrast Biden's multilateralism and innovation-driven strategies focused on building alliances and long-term collaboration. While Biden's administration prioritised proportional benefits through steady engagement, Trump's approach is rooted in immediate, inverse proportionality, seeking maximum gain for minimal input from the US. These contrasting strategies reflect their distinct leadership styles, with Biden emphasising gradual, relationship-focused diplomacy and Trump relying on bold, personality-driven alliances.

Conclusion

In the case of India, the Trump-Modi dynamic, which flourished during Trump's first term, is likely to deepen in his second term, further strengthening US-India ties in sectors such as trade, defence, and technology. Yet, this growing partnership could expose areas of strain, particularly on issues where the US and India's interests diverge. While big-ticket sectors like arms and energy may dominate efforts to balance the US-India trade deficit under Trump 2.0, they risk contradicting India's strategic priorities. However, sectors like semiconductors and pharmaceuticals offer win-win opportunities, with ongoing collaborations in semiconductors and the potential to diversify India's China-reliant pharmaceutical supply chain through increased trade with the US. As the US-India relationship evolves, it will remain a cornerstone of US strategy in the Indo-Pacific, but balancing cooperation with potential friction will be crucial for sustaining its long-term success.

The US-China competition has become the defining issue of US strategy. In the latter half of this decade, the US faces the challenge of outcompeting China across critical domains. It remains to be seen where India can position itself in the emerging spin-offs of the great-power competition while readjusting to the uncertainties induced by Trump. 

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