



## India-US Relations: Pakistan Re-emerges in Trump 2.0

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# India-US Relations: Pakistan Re-emerges in Trump 2.0

The India-United States strategic relationship has evolved from a controversial post-nuclear exploration in the early 2000s, rooted in lack of trust from the Cold War years, into a dynamic and multifaceted partnership encompassing defense, trade, technology, energy, and commitment to a rules-based order. From President George W. Bush's administration, which spearheaded the landmark US-India civil nuclear deal, opening the door for cooperation between the United States and India on civilian nuclear energy after India's 1998 nuclear tests,<sup>1</sup> to the emphasis on a shared Indo-Pacific vision under subsequent US presidencies, the arc of the bilateral relationship has consistently bent toward greater convergence since the end of the Cold War. Among the most potent indicators of this maturity is the exponential growth in bilateral trade, which reached \$131.84 billion in 2024-2025<sup>2</sup> from just over \$30 billion in 2006, and the deepening of strategic trust, reflected in foundational defense agreements, codevelopment initiatives, and unprecedented levels of military interoperability.<sup>3</sup>

Central to this strategic embrace is a robust defense partnership. With the signing of four foundational defense agreements—GSOMIA (Security Measures) in 2002, LEMOA (Logistics Exchange) in 2016, COMCASA (Communications Compatibility) in 2018, and BECA (Geospatial Intelligence) in 2020—the two countries have effectively scripted the legal and operational basis for

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comprehensive military cooperation. Joint military exercises such as Yudh Abhyas, Tiger Triumph, and Malabar as well as minilateral associations such as the Quad have catapulted the relationship beyond symbolism to actual crisis response.<sup>4</sup> India and the United States now coordinate in battlefield scenarios, logistics, and intelligence sharing.<sup>5</sup> At the strategic level, recurring high-level dialogues—most notably the 2 + 2 Dialogue between defense and foreign ministers of both countries—and the frequency of leader-level summits underscore the importance each side places on maintaining close alignment on key regional and global issues.

For much of the world, the onset of Donald Trump's second administration marked an inflection point in international affairs, signaling a potential departure from established global norms and institutions. In India, however, the anticipation was markedly different, based on the experience of the first Trump administration, with optimism of continuity and a deepening of the bilateral strategic partnership outweighing disruption concerns.<sup>6</sup> This optimism stemmed from a trajectory that had, over the past two decades, matured into a bilateral relationship beyond any individual leader which balanced itself between an alliance and a calibrated friendship.

In his second term, however, Trump has taken a somewhat different approach to bilateral relations. Broadly speaking, the principles of the India-US Comprehensive Global Strategic Partnership delineated under Trump's first term<sup>7</sup> and the Major Defense Partner status bestowed on India through a Congressional act under the Obama administration,<sup>8</sup> while proving inadequate to sway Trump away from an unpredictable and unscripted approach to India-US relations, have nevertheless recently served as guardrails for the bilateral relationship.

**The Trump administration has quickly moved to embrace Pakistan, even as US-India relations suffered**

However, Trump's opportunistic meddling in the India-Pakistan conflict since May this year has reflected a troubling pivot in the United States's Pakistan policy, which New Delhi worries may alter the axial relations with Washington cultivated over the last two decades.<sup>9</sup> Specifically, the Trump administration has quickly moved to embrace Pakistan, even as its relationship with India has suffered.<sup>10</sup> In just two months, Pakistan's General Asim Munee has visited the United States twice,<sup>11</sup> using American soil to engage

in nuclear saber-rattling against India.<sup>12</sup> For Pakistan, the larger purpose behind issuing nuclear threats from US soil is to enhance its nuclear posture

by bringing in the United States as a structural factor in the India-Pakistan nuclear dyad.<sup>13</sup>

In a short span between March and early August this year, Pakistan has turned a strategic corner with the United States. Since March, Pakistan has handed a high-value ISIS-K operative behind the 2021 bombing in Kabul to the United States; used crypto diplomacy, with the Pakistan Cypto council engaging with World Liberty Financial, a Trump-backed cryptocurrency venture; and significantly raised spending in lobbying in DC.<sup>14</sup> As if snubbing India to the advantage of Pakistan was not enough, the Trump administration recently doubled down on imposing secondary tariffs to the tune of 50 percent on India for importing Russian oil.<sup>15</sup> What may have begun as Trump's frustrations about India's reluctance to let him take credit for bringing the India-Pakistan conflict to a halt has now ballooned into the US administration using trade as leverage to express their displeasure, and potentially a larger crisis if these rapid changes in deteriorating India-US relations and warming Pakistan-US relations continue.

## Sources of Initial Optimism

Despite Trump's efforts after the recent military escalation to mediate a cease-fire,<sup>16</sup> effectively re-hyphenating India and Pakistan, India's expectations of continuity remain grounded in the sustained policy alignment between New Delhi and Washington across a range of critical areas. Nowhere has this alignment appeared more evident than in the Indo-Pacific, the principal arena of geopolitical contestation in the twenty-first century. Both India and the United States have consistently advocated for a free, open, and rules-based Indo-Pacific, seeking to uphold a favorable balance of power and prevent the rise of any asymmetrical advantages for China, whether in the maritime domain, regional infrastructure financing, or technological standard-setting. Shared concerns over Chinese assertiveness, particularly in the South China Sea and along India's northern borders, have only further catalyzed strategic convergence. Although, on sensitive issues such as Taiwan, the contours of the India-US relationship remain to be tested.<sup>17</sup>

Anticipations of continued productive US-India ties during Trump's second term were grounded in the Modi-Trump bonhomie established during the first Trump administration, symbolized in high-profile events such as the "Howdy Modi" rally in Houston in 2019 and the "Namaste Trump" event in Ahmedabad in 2020. In February 2025, the two leaders met, exchanging a strong personal rapport, further undergirding the sense of continuity in bilateral relations under a renewed Trump presidency.<sup>18</sup>

**For India, the prospect of Trump's return to the White House was viewed as an opportunity**

During Trump's first term, India and the United States signed important defense agreements such as COMCASA (Communications Compatibility and Security Agreement) and BECA (Basic Exchange and Cooperation Agreement for Geospatial Intelligence), enhanced cooperation under the Quad<sup>19</sup> framework along with Japan and Australia, and augmented trade and energy ties. These milestones laid the groundwork for expectations in New Delhi that a second Trump term would not only preserve these gains but potentially accelerate cooperation in newer domains such as critical and emerging technologies, cyber defense, supply chain diversification, and counterterrorism. Certainly, any anticipation that Trump would work at cross-purposes with India was entirely missing. For India, the prospect of Trump's return to the White House did not signal uncertainty or rupture. It was viewed as an opportunity to build on the strong existing framework and make a strategic leap forward.

### **Shifting US-Pakistan Engagement**

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Although India and the United States have built strong bilateral ties, the relationship has not been immune to external shocks or policy recalibrations. With Trump's second term, the recurring influence of Pakistan in the United States's regional calculations, an issue that India believed had been largely neutralized in bilateral discourse over the last half-decade, has returned.<sup>20</sup> Since the Bill Clinton administration, successive US administrations had gradually moved away from viewing South Asia through the traditional India-Pakistan hyphenation, especially as the India-US partnership began to diversify into areas like technology, defense procurement, space, and counterterrorism cooperation. In this sense, the Pakistan factor, once a central variable in US foreign policy toward the region, had been significantly de-emphasized, even as the United States's stakes with India grew rapidly.

However, recent developments suggest that Pakistan may once again reinsert itself into US strategic thinking, particularly under the evolving dynamics of the second Trump administration. Historically, US policy toward Pakistan has oscillated between frustration over its support for terrorism,<sup>21</sup> questions about its strategic utility, concerns over internal turmoil within that country, and developments inside neighboring Afghanistan. The Trump administration's first term witnessed a clear hardening of the US stance on Pakistan. In January 2018, President Trump openly called out Pakistan for harboring terrorist safe

havens and even suspended military aid to Islamabad.<sup>22</sup> Meanwhile, India and the United States, as strategic allies, grew closer in their Indo-Pacific vision and strategic alignment.<sup>23</sup>

Additionally, in 2019, the Pulwama terrorist attacks by Jaish-e-Mohammed (JeM), a Pakistani extremist militant group, in Kashmir resulted in the death of forty Indian Central Reserve Police Force (CRPF) personnel.<sup>24</sup> In response, India struck JeM's biggest camp in Pakistan in a "non-military-pre-emptive" action on February 26, 2019.<sup>25</sup> The selection of the target was conditioned by India's need to avoid both civilian casualties and military installations as well as to prevent further attacks. Following the attack, the United States called out Pakistan and supported India's right to self-defense against cross-border terrorism.<sup>26</sup> Unlike Trump's second term, which has become a sore point in the bilateral relationship for the lack of credit given by India to Trump, in 2019 India received strong assurances from the United States to work together to ensure that Pakistan ceases to be a safe haven for JeM or other terror outfits and to develop common strategies to hold Pakistan accountable under its own obligations to UN resolutions.

In May 2025, a similar event occurred when the Pakistani terrorist organization The Resistance Group (TRF) killed twenty-six civilian tourists in Kashmir, leading India to launch Operation Sindoor, which struck terrorist infrastructure inside Pakistan.<sup>27</sup> Once again, Washington was quick to affirm India's right to self-defense—this time, in particular, Vice President J.D. Vance, whose visit to India coincided with the attack. Subsequently, in July, the US State Department added the TRF as a designated Foreign Terrorist Organization (FTO) and Specially Designated Global Terrorist (SDGT).

Only this time, since the military escalation between India and Pakistan over the Pahalgam attacks, Trump has consistently and deliberately reiterated—at least a dozen times—that he successfully mediated between India and Pakistan to enforce a ceasefire between the two countries.<sup>28</sup> He has even claimed that he used trade as leverage to coerce India and Pakistan to come to the table and ultimately agree to stop the military fight.<sup>29</sup> While Pakistan readily embraced this idea, it played out completely differently with India. Donald Trump's willingness to play into Pakistan's hands during his second administration—in complete contrast to his past policy—may not have caused deep or immediate damage to India-US relations, but it signals a notable shift in Washington's strategic calculus driven more by short-term tactical gains than by long-term strategic coherence. For India, this policy adjustment is viewed with caution rather than alarm, as New Delhi has long become attuned to the cyclical nature of US-Pakistan engagement which depends upon on the strategic utility of Pakistan. But in his second term, Trump seems to be reevaluating Islamabad's utility in increasingly economic terms.

The current US disengagement from Pakistan solidified in the 1990s, when the Nawaz Sharif government was rebuffed by the Clinton administration in its efforts to seek greater military and political support. When the Clinton administration deciphered Pakistan's complicity in violating the Line of Control (LoC) with India in the Kargil sector, it laid the blame squarely on Pakistan.<sup>30</sup> That episode may have been the beginning of a slow but steady erosion in Pakistan's perceived utility to the United States, first as a Cold War ally and later as a front-line partner in the War on Terror. Although Pakistan's value as a strategic partner remained a potent sell in DC in the post-9/11 counterterror efforts in the region, the trust took a hit—parallel with Washington's waning interest in the broader Middle East—with Osama bin Laden being found in Abbottabad, a military garrison town in Pakistan. The region's diminishing economic importance, especially as the United States became more energy independent and more disillusioned with its role as a laboratory for liberal interventionism and democracy promotion, reduced the incentive for long-term American military entanglement.

Compounding this marginalization is Pakistan's internal instability, especially in the western provinces of Balochistan and Khyber Pakhtunkhwa, which have witnessed escalating unrest, insurgent violence, and governance failures. These restive regions, where infrastructure and political control remain fragile, are deeply inhospitable to foreign investment, as China's investments in the region have witnessed. This reality has undercut any viable prospects of US involvement in Pakistan's resource sector, especially in critical minerals and rare earths. While there have been speculative discussions about US-Pakistan cooperation in critical and emerging technologies, these remain far-fetched as long as China remains the dominant external actor in Balochistan through China Pakistan Economic Corridor (CPEC) investments. For the second Trump administration, which has taken an economic lens to most of its relations, potential economic opportunities in Pakistan, its pliability in pandering to Trump's ego, Islamabad's nomination of Trump for the Nobel Peace Prize, and its readiness to accept both Trump's role in dousing the current crisis as well as future mediation with India have all converged to outweigh the policy assessment in Washington that Pakistan may have lost its importance.

In this second term in particular, Trump's attempts to claim credit for mediating the India-Pakistan dynamic mark a shift in the US approach to the region established over the last three decades. Although even in his first term, in the aftermath of the 2019 Pulwama terror attack and India's subsequent Balakot air strikes, President Donald Trump sought to insert himself into the bilateral equation as a mediator,<sup>31</sup> in his second term, Trump's recurring public claims that the United States had mediated a ceasefire between the two nuclear-armed neighbors have stood in stark contrast to India's long-standing policy of

opposing third-party involvement in its bilateral issues with Pakistan. India has swiftly and firmly denied Trump's claims, such as with Indian Foreign Secretary Vikram Misri's preemptive remarks from Kananiskas on the sidelines of the G7 meeting, which rejected assertions from the Oval Office about trade talks being a precondition for ceasefire with Pakistan.<sup>32</sup> On June 17, Donald Trump invited Narendra Modi to the United States, requesting a stopover in Washington on his way back from the G7 summit in Canada. India's refusal to the meeting, citing scheduling issues of the prime minister, found a post facto validation when Trump met Pakistan's Army chief the next day on June 18 in the Oval Office.<sup>33</sup> Misri rushed to announce India's inability to be a part of the meeting with Trump, before Trump could refer to the same publicly. India is likely to continue the strategy of countering incorrect and diplomatically intrusive statements from Trump in the future.

**T**Trump's attempts to claim credit for mediating a ceasefire mark a shift in the US regional approach

Pakistan appeared to gain rhetorical advantage from Trump's narrative, particularly as it tried to save face after India targeted terror infrastructure with multiple precision strikes.<sup>34</sup> Trump referred to India and Pakistan in a Truth Social post as two "great nations,"<sup>35</sup> which some in India viewed as implying a false equivalence between the two powers and implicitly validating Pakistani terrorism. While India's military actions and diplomatic messaging sought to isolate Pakistan internationally as a state sponsor of terror,<sup>36</sup> Trump's framing diluted this message by placing both countries on equal footing in the context of conflict resolution. In effect, efforts to hyphenate India and Pakistan, which successive US administrations painstakingly sought to move away from, were dangerously revived by Trump through his off-the-cuff remarks and self-aggrandizing claims of brokering peace. India, for its part, maintained a consistent and principled rebuttal, reinforcing its preference for direct dialogue with Pakistan only under the condition that cross-border terrorism ends and asserting that third-party mediation, however well-intentioned, is unwelcome.

## Understanding Trump's Pakistan Embrace

Donald Trump's overtures toward Pakistan in his second term must be understood through the prism of his fundamentally transactional worldview, wherein economic opportunity forms the bedrock of all foreign relationships, be it with rivals, partners, or even longstanding allies. His foreign policy is essentially the belief that every bilateral or multilateral engagement should yield tangible



benefits for the United States, particularly in economic or personal terms. This approach has been most visible in his aggressive use of trade and tariffs, which put even America's closest allies under economic pressure, reshaping the traditional character of US partnerships and transforming alliances into market-places for leverage and bargaining.

In the case of Pakistan, Trump seems to have sensed a multi-pronged opportunity during the India-Pakistan military standoff in his second term, ranging from conflict resolution to economic gains. The irony in Trump's embrace of Pakistan at the cost of its relations with India could not be more pronounced. Pakistan's relations with China have grown significantly in the last decade, yet its geopolitical and economic relevance in the region and beyond seems limited. As for India, its strategic discourse has grown agnostic to Pakistan, while economically India has surged ahead of Pakistan to focus on broader regional issues of Indo-Pacific security and regional connectivity as a key player in global geopolitics.

Trump's repeated offers to mediate are consistent with his obsession with projecting himself as a dealmaker capable of resolving historically entrenched disputes. Possibly, Trump views the India-Pakistan theater as offering him a convenient opportunity to assert diplomatic dominance and publicize an image of global problem-solving. However, this narrative serves more to reinforce his personal brand than to reflect any real success in conflict resolution. Globally, it also raises serious concerns about the instrumentalization of crises for specific interests. Trump's simultaneous use of trade as leverage by imposing tariffs on

**T**Trump's use of trade as leverage is passive-aggressive diplomacy masking as crisis management

Indian goods and conditioning economic and military relief to Pakistan on strategic cooperation is passive-aggressive diplomacy designed to extract concessions while masking it as crisis management. Trump's mediation rhetoric, whether unsolicited or welcome, caters to his enduring desire for global recognition, potentially even the Nobel Peace Prize, as a symbol of his ability to solve age-old international conflicts. The foundations of a sudden warmth in US-Pakistan relations seem to be grounded in contin-

ued gains from Islamabad, whether economic or otherwise. Whether this could meaningfully alter Trump's strategic calculus in South Asia remains to be seen, especially as other externalities like the role of China in the region and India's own repositioning continue to play out.

The global geopolitics have shifted considerably since the first Trump administration. The Middle East region, for instance, has several ongoing conflicts,

compelling America to adopt a different approach. In his second term, Trump has two broad interests in the Middle East: defending Israel against Iran while curbing the latter's nuclear ambitions, and extending the Abraham Accords in such a way that regional peace can be stitched together.<sup>37</sup> The latter is important from an economic perspective, as Trump seeks to extend connectivity through an energy corridor linking the Mediterranean with the Indo-Pacific. If the Israel-Iran dynamic escalates into a broader regional conflict with ripple effects across the Persian Gulf, Afghanistan, and South Asia, the United States views Pakistan as a country geographically proximate to Iran which can be used as a potential asset in managing the regional fallout.<sup>38</sup>

As the Middle East teeters on the brink of wider confrontation, Washington is quietly exploring regional contingencies and how Pakistan figures into this calculus. Trump's invitation to Pakistan Army Chief General Asim Munir to Washington is emblematic of his readiness to engage directly with the real power center in Pakistan, the military establishment, without the usual democratic pretenses.<sup>39</sup> This revealing gesture highlights a tacit acknowledgment within the Trump administration that Pakistan's civilian institutions are often nominal, and that real strategic decisions are dictated by Rawalpindi, not Islamabad. More importantly, it signals a willingness by Washington to legitimize this military dominance, effectively granting concessions to Pakistan, including those that undermine India's security interests.

The timing of General Munir's visit to the United States suggests an American interest in positioning Pakistan as a strategic backchannel or buffer in the event of a military flare-up involving Iran.<sup>40</sup> While Pakistan's historical ties with Iran and its emerging Islamic axis, including alignment with Türkiye and Qatar, may complicate its calculus, its need for International Monetary Fund (IMF) bailouts, US support in multilateral forums, and access to Western military technology ensures that Islamabad remains sensitive to American interests. For Washington, especially under Trump, Pakistan offers a potentially pliable partner that can be instrumentalized in both regional geopolitics and great-power competition. If nothing else, military positioning in Pakistan can be strategically useful for the United States. As such, General Munir's visit, especially for a no-photo-op meeting, suggests Trump's calculated moves to secure Pakistan's cooperation in the event of an impending conflict with Iran.

Additionally, there is ample evidence that the underlying motivation for Trump's Pakistan embrace is economic—especially related to three major financial interests that converge with broader US strategic goals. First is the link between the Trump family's growing involvement in the cryptocurrency sector<sup>41</sup> and Pakistan's emerging crypto designs.<sup>42</sup> Trump recently launched his own digital currency, "\$TRUMP,"<sup>43</sup> as part of his wider political branding and financial ecosystem. Reports suggest that Pakistan launched its own national

crypto reserve which has made investments in ventures tied to Trump-linked firms,<sup>44</sup> creating a potential conflict of interest which is hard to counter legally given the unregulated and opaque nature of international crypto dealings. This convergence of financial interests may well explain the urgency and warmth in Trump's re-engagement with Pakistan, offering a rare intersection between private enrichment and statecraft.

Second, there is a deeper, longer-term economic play at work: the prospect of a critical minerals partnership. With growing geopolitical competition with China, the United States has grown increasingly concerned about China's dominance over the global supply of critical and emerging minerals essential for semiconductors, electric vehicles, and advanced military hardware.<sup>45</sup> Emerging studies and

**T**here is a deeper, longer-term economic play at work: the prospect of a critical minerals partnership

geological surveys suggest that western Pakistan, particularly the Balochistan region, may hold untapped reserves of such minerals including lithium, rare earth elements, and cobalt.<sup>46</sup> In this context, a strategic mineral deal with Pakistan along the lines of those the United States has pursued with Ukraine could offer an economic and geopolitical win for Trump. While such a deal remains speculative, it aligns well with Trump's vision of securing economic dominance through bilateral arrangements that seem institutionalized

but remain heavily personalized. Any such deal, however, comes with the danger of sucking the United States back into a counter-terrorism whack-a-mole, given the state of insurgency in both Balochistan and Khyber-Pakhtunkhwa regions in Pakistan's west.<sup>47</sup>

Thirdly, Trump's reference to a potential oil deal with Pakistan has further underscored the economic motivations of the Trump presidency's newfound ties with Pakistan. An unproven oil reserve of recoverable oil to the tune of 9.1 billion barrels, according to estimations by the US Energy Information Administration (EIA),<sup>48</sup> is an element of Trump's attempt to draw a new linkage with Pakistan. Since most of Pakistan's earlier attempts to extract oil to turn around the country's fortunes have failed, it remains to be seen how successful Trump's new bet will be. Meanwhile, in what could be among the first markers of concrete shifts in US-Pakistan relations, Pakistan is set to receive its first crude supply from the United States.<sup>49</sup> Cnergyico, Pakistan's largest refinery, has struck a deal with Vitol to import its first-ever shipment of US crude oil. The deal involves 1 million barrels of West Texas Intermediate (WTI) light crude, slated to arrive in the second half of October 2025.<sup>50</sup>

Trump's renewed embrace of Pakistan in his second term reflects a deliberate shift in the American strategic calculus—one that is economically opportunistic, diplomatically disruptive, and increasingly shaped by personalized interests. While India remains a key strategic partner for the United States, Trump's fluid transnationalism introduces a layer of unpredictability that could strain the India-US relationship, particularly if Pakistan is once again granted strategic indulgence for short-term gains. The reintroduction of Pakistan into the American sphere, albeit not as a traditional ally but as a functional instrument of economic and geopolitical utility, marks a reversion to a pattern that India had hoped the bilateral relationship had long outgrown.

## India's Concerns

For India, recalibrations in US-Pakistan policy revive longstanding anxieties. The notion that Washington could view Islamabad once again as a strategic partner, even if for pragmatic reasons, stirs concerns about dual signaling and trust erosion. While India-US ties remain strong and multi-vectored, a renewed US-Pakistan engagement has the potential to inject new friction into the bilateral equation. This is not to suggest a return to the Cold War-style alignment patterns, but rather the emergence of intermittent tensions which test the resilience and maturity of the India-US partnership. India remains wary of any US military assistance or economic rehabilitation directed toward Pakistan, especially if such support is not conditioned on Pakistan's actions on terrorism. The divergence over Pakistan could complicate the growing institutionalization of India-US strategic coordination. While the Quad, I2U2 (India-Israel-UAE-US), and bilateral technology initiatives such as Transforming the Relationship Utilizing Strategic Technology (TRUST) demonstrate the shared long-term vision between New Delhi and Washington, such platforms depend heavily on strategic trust.

India has responded to Donald Trump's policy inconsistency with carefully calibrated diplomatic poise. While Trump's repeated and often misleading claims about his role in mediating between India and Pakistan may have grabbed headlines, New Delhi has largely dealt with it through its consistent rebuttal of Trump's assertion that he exerted pressure on India to agree to a ceasefire or trade concession in the wake of military tensions with Pakistan. India has instead maintained and reiterated at multiple levels that it was Pakistan that reached out first through the Director Generals of Military Operations (DGMO) hotline to seek a ceasefire.<sup>51</sup>

As mentioned, India's diplomatic firmness was on display when Foreign Secretary Vikram Misri pre-empted any White House narrative that Trump used the

tariff leverage to bring together the Indian leader and Pakistan's Army Chief for negotiations when Trump invited Modi to visit the United States on his way back from the G7 meeting in Canada. The refusal, while diplomatically polite, was unmistakably a rejection of Trump's presumptive mediation script. India has held firm to its long-standing position that no third-party mediation is acceptable on issues that concern its sovereignty, especially the Kashmir dispute.

Trump's insistence on positioning himself as a global dealmaker capable of resolving entrenched disputes—whether between Israel and Palestine, Ukraine and Russia, or India and Pakistan—might serve his personal and political ambi-

**India has moved on from the outdated binary of “India vs. Pakistan”**

tions, but it lacks any demonstrable success. In fact, none of the major conflicts Trump has claimed to influence have witnessed lasting or meaningful resolutions under his stewardship. His approach to the India-Pakistan conflict, utilizing economic coercion or trade threats, reflects a shallow understanding of the historical, political, geographical, and religious complexities that define this enduring

dispute. More fundamentally, it misunderstands the ground realities that India has moved on from the outdated binary of “India vs. Pakistan,” while Pakistan continues to face systemic collapse. It remains a country which is politically unstable, economically fragile, and surrounded by hostile borders with Iran, Afghanistan, and India.

Trump's embrace of Pakistan may serve immediate US strategic or economic goals, but it is by no means a guarantor of regional peace. The logic of rewarding Pakistan's instability or relegitimizing its military-dominated state structure risks undermining hard-won regional equilibrium. Moreover, Washington's apparent willingness under Trump to recognize Pakistan's military leadership rather than its elected representatives as the true power center sends troubling signals about US priorities. While the India-US relationship is robust, strategic, and largely structural, Trump's erratic diplomacy injects unnecessary friction into what has otherwise been a stable and forward-looking bilateral engagement. It creates avoidable discomfort for India, not because it threatens the foundation of the partnership, but because it blurs the clarity of shared priorities.

## **The Future of the US-India Relationship**

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Looking ahead, three variables will determine the impact of Trump's Pakistan outreach on the India-US relationship. First, the trajectory of Trump's Indo-Pacific strategy, especially in relation to China. If Trump dilutes Washington's

commitment to countering Chinese influence in the Indo-Pacific—possibly in the pursuit of a transactional economic deal with Beijing—the relevance of India as a counterweight could temporarily be without much purpose. However, given the entrenched nature of US-China strategic competition, such a shift appears unlikely.

The second factor is the evolution of the Iran-Israel conflict. In this increasingly combustible region, Pakistan may be viewed by Washington as a contingency actor for managing fallout. Yet, this could backfire if Islamabad plays both sides—aligning with an emerging Islamic axis while extracting favors from the United States—a duality that could spark instability across the Middle East and South Asia.

Third, Trump’s reversal of Biden-era clean energy policies and his renewed emphasis on fossil fuels may position Pakistan as a potential energy partner or market. The beginning of US oil shipments to Pakistan in October this year, alongside a potential US investment in energy exploration in Pakistan, could be an inflection point in US-Pakistan energy relations and could cast a shadow on US-India relations. Meanwhile, India has ramped up its energy imports from the United States in an effort to rebalance ties and meet its larger goal of augmenting energy imports from \$15 billion in 2024 to \$25 billion in the near future.<sup>52</sup> How the United States balances these two vectors remains to be seen.

Despite the political flux in the bilateral relationship since the second Trump administration has sought somewhat divergent policies, India-US defense cooperation remains one of the strongest anchors in the relationship. With India’s status as a Major Defense Partner, ongoing defense trade, joint exercises, and trusted technology cooperation under initiatives like TRUST, the relationship is poised to deepen. These ties are unlikely to unravel due to Trump’s inconsistent overtures toward Pakistan.

However, if the United States chooses to deepen its embrace of Pakistan without caution, it risks enabling Islamabad to act as a swing state between Washington and Beijing, undermining stability not only in South Asia, but also in the broader Middle East. Thus, while India may not be visibly rattled by Trump’s recent diplomatic improvisations, it is acutely aware of the strategic implications. New Delhi’s quiet but firm rebuttals signal a mature diplomacy rooted in confidence. India recognizes that it has no need for public sparring, but is aware of the risks and unwavering in defending its sovereign stance.

In sum, the India-US strategic partnership has made enormous strides in recent decades and stands today as a pillar of the Indo-Pacific architecture.

**If the US deepens its embrace, it may enable Pakistan to act as a swing state with China**

These gains, solidified by mutual interests in countering China, advancing technology, and supporting democratic values, are real and consequential. Yet, like all mature partnerships, this one is susceptible to stress tests, often from unexpected quarters. The re-emergence of the Pakistan factor under a second Trump administration may not fundamentally derail the relationship, but it certainly introduces new variables that could test its endurance. These intermittent tests, driven by regional realignments, competing tactical imperatives, and evolving threat perceptions, will define the texture of the partnership in the coming years. The challenge for both India and the United States will be to manage these divergences without losing sight of the larger strategic horizon that binds them.

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