

ISSUES & INSIGHTS 26.11

SEPTEMBER 2026



# The United States and India: Different Perspectives, Common Challenges

EDITED BY  
ROB YORK





Founded in 1975, the Pacific Forum is an independent, nonpartisan, and non-profit foreign policy research institute based in Honolulu, in the US state of Hawaii. The Forum's focus areas encompass current and emerging political, security, economic, and business issues and work to help stimulate cooperative policies in the Indo-Pacific through research, analyses, and dialogues undertaken with the region's leaders in academia, public policy, military, and industry. The Forum collaborates with a network of more than 30 research institutes around the Pacific Rim, drawing on Asian perspectives and disseminating project findings and recommendations to opinion leaders, governments, and various publics throughout the region. We regularly cosponsor conferences with institutes throughout Asia to facilitate nongovernmental institution building as well as to foster cross-fertilization of ideas.

A Board of Directors guides the Pacific Forum's work. The Forum is funded by grants from foundations, corporations, individuals, and governments. The Forum's studies do not engage in classified or proprietary work.

#### **Support Pacific Forum**

Pacific Forum is a private, independent, nonpartisan, and non-profit, 501(c)(3) organization. Make a tax-deductible charitable contribution at [www.pacforum.org/support-us](http://www.pacforum.org/support-us)

To support a specific program, please contact our Director of Development at: [brooke@pacforum.org](mailto:brooke@pacforum.org)

#### **PACIFIC FORUM STAFF**

President & CEO  
**DAVID SANTORO, Ph.D.**

Executive Director & Head of National Security & Defense  
**KIMBERLY LEHN**

Chief Development & Research Officer  
**AKHIL RAMESH**

Senior Advisor  
**BRAD GLOSSERMAN**

Director for Regional Affairs  
**ROB YORK, Ph.D.**

President Emeritus & WSD-Handa Chair in Peace Studies  
**RALPH COSSA**

Director of Development & Grants Management  
**BROOKE MIZUNO**

Director of Communication & Outreach  
**SHANNA KHAYAT**

Executive Assistant  
**GEORGETTE ALMEIDA**

Program Managers  
**CHRISSY FISHER**  
**RAYANNE FUJIMOTO**  
**EMILY COLLEYE**

**Media: Carnegie Endowment for International Peace**

## TABLE OF CONTENTS

|                                                                                                                                                                                     |    |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|
| INTRODUCTION                                                                                                                                                                        | 1  |
| PACNET 39, 05/19/2025 - THE WASHINGTON FACTOR IN INDIA-PAKISTAN TENSIONS: A KAUTILYAN PERSPECTIVE. BY KAJARI KAMAL                                                                  | 2  |
| PACNET 40, 05/27/2025 - NEW STRATEGIC HORIZONS FOR THE GROWING PHILIPPINES-INDIA MULTI-FACETED PARTNERSHIP. BY SHRISTI PUKHREM AND DON MCLAIN GILL                                  | 5  |
| PACNET 50, 06/18/2025 - FORGING US-INDIA PARTNERSHIP FOR "RE-ESTABLISHING DETERRENCE" IN THE INDO-PACIFIC. BY MONISH TOURANGBAM & ROB YORK                                          | 8  |
| PACNET 77-1, 10/02/2025 - NAUTICAL GAMES: THE GREAT NICOBAR ISLAND PROJECT (PART I). BY MOHAN MALIK                                                                                 | 11 |
| PACNET 78-1, 10/06/2025 - NAUTICAL GAMES: THE GREAT NICOBAR ISLAND PROJECT (PART II). BY MOHAN MALIK                                                                                | 13 |
| PACNET 83, 10/14/2025 - SECURING DIGITAL LIFELINES: RESILIENCE FOR INDIA AND OTHERS IN THE AGE OF CABLE SABOTAGE. BY BRENDON J. CANNON                                              | 16 |
| THE PILOT #10, 02/25/2026 - A REVITALIZED INDIA OCEAN STRATEGY CANNOT IGNORE AFRICA. BY MICHAEL RUBIN                                                                               | 19 |
| THE PILOT #11, 03/03/2026 - THE IMPACT OF THE INDIA-ISRAEL PARTNERSHIP ON US STRATEGIC INTERESTS. BY JASON M. OLSON, PH.D.                                                          | 21 |
| THE PILOT #25, 04/16/2026 - THE VIEW FROM INDIA: THE IRAN WAR FORGES A NEW INDO-PACIFIC. BY SIDDHARTH SINGH                                                                         | 23 |
| THE PILOT #36, 06/03/2026 - FROM DELHI'S WATCHTOWER: THE TRUMP-XI SUMMIT AND INDIA'S ENDURING VIGILANCE. BY SRIPARNA PATHAK                                                         | 25 |
| THE PILOT #48, 07/22/2026 - INDIA MUST REMAIN STRATEGICALLY AUTONOMOUS IN THE PAX SILICA FRAMEWORK. BY RAMI NIRANJAN DESAI                                                          | 27 |
| THE PILOT #49, 07/30/2026 - CHINA FALLS SHORT AS A GLOBAL SOUTH "PUBLIC GOODS" PROVIDER. BY OORJA TAPAN                                                                             | 29 |
| THE PILOT #52, 08/13/2026 - THE RECALCITRANT ALLY: WHAT INDIA THINKS ABOUT AMERICA AFTER THE WAR IN IRAN. BY HINDOL SENGUPTA                                                        | 31 |
| THE PILOT #57, 08/21/2026 - REWIRING THE INDIAN OCEAN: WHY THE WORLD'S DATA IS TAKING NEW PATHS. BY SAMUEL BASHFIELD, GRACE CORCORAN, DR. V. SRIDHAR AND PROF. BALAJI PARTHASARATHY | 33 |
| THE PILOT #59, 08/27/2026 - MEASURING TRUST VERSUS INFLUENCE IN INDIA-SOUTHEAST ASIA RELATIONS. BY SATU LIMAYE                                                                      | 35 |
| THE PILOT #60, 08/28/2026 - INDIA-CHINA COMPETITION IN THE INDIAN OCEAN: STABILITY IS NOT RESET. BY SANA HASHMI                                                                     | 37 |
| THE PILOT #61, 08/31/2026 - THE SOUTH ASIAN BALANCE OF POWER AFTER STUDENT REVOLUTIONS. BY AMBASSADOR (RET.) JAMES MORIARTY                                                         | 39 |

# Introduction

2025 and 2026 have proven to be eventful years for the US-India partnership—for good and for ill. Since mid-2025 Pacific Forum has, with the support of the Hindu American Foundation, stepped up our efforts to recruit and publish commentary from leading experts on, in, and around India to include their insights on regional security. Some of the best examples of that work, encompassing *PacNets* from 2025 and, following the name change, *Pilot* contributions in 2026, are included here.

The challenges the bilateral has faced are reflected here: Indian experts display frustration with US intervention in last year's Operation Sindoor, with tariffs, and with the impact of the Iran War on global trade. Experts on the broader South Asian region look at developments—such as revolutions and changes of leadership in Bangladesh and Nepal—and wonder if the US is prepared to compete for these new governments' affections. As always, the People's Republic of China looms, prepared to woo regional governments should the US and India fail to.

Despite these challenges, there remains a sentiment that India's and the US' fates are intertwined: For all their differences, Washington and New Delhi are democracies, and the PRC's expanding influence concerns both of them. Contributions such as those published by Pacific Forum last year should provide a telling overview of how India and its neighbors see the region, and hopefully provide Washington with the data points it needs to foster this partnership for the long term.

Rob York  
Director for Regional Affairs  
Pacific Forum



***THE WASHINGTON FACTOR IN INDIA-  
PAKISTAN TENSIONS: A KAUTILYAN  
PERSPECTIVE***

BY KAJARI KAMAL

*Dr. Kajari Kamal ([kajari@takshashila.org.in](mailto:kajari@takshashila.org.in)) is  
Associate Professor at The Takshashila Institution.*

Following the deadly terrorist attacks in Pahalgam, Jammu and Kashmir on April 22, Delhi and Islamabad engaged in immediate diplomatic and security [measures](#) and [countermeasures](#). This period of heightened tension culminated in a four-day military clash that ultimately concluded with an "[understanding](#)" between the two nations. The international community's response to these events has varied, encompassing widespread condemnation and condolences, appeals for de-escalation and restraint, and expressions of enthusiastic or cautious support for India or Pakistan. These reactions, viewed through the lens of ancient Indian strategic thought, starkly highlight the enduring primacy of political interests in the global arena, echoing the rajamandala (circle of states) theory articulated by Kautilya. Within this framework, the response of the United States—arguably occupying the position of the udasina (neutral king) in India's rajamandala—warrants scrutiny.

***The US in India's rajamandala***

Kautilya's seminal [Arthashastra](#) conceptualizes the intricate web of interstate relations through the rajamandala, a construct comprising 12 distinct categories of states. The defining characteristics of each state within this system are determined by a confluence of three key factors: geographical proximity, the prevailing balance of power, and the state's intentions or

disposition (bhavin). Applying this ancient wisdom to contemporary geopolitics, the United States arguably embodies the quintessential udasina—the neutral king—within India's rajamandala.

"One outside (the sphere of) the enemy, the conqueror and the middle king, stronger than (their) constituents, capable of helping the enemy, the conqueror and the middle king when they are united or disunited and of suppressing them when they are disunited, is the neutral king."

In the context of the post-Pahalgam scenario, India assumes the role of the vijigishu (the aspiring conqueror), Pakistan its immediate ari (enemy), and China potentially fits the description of the madhyama (middle king) or parshnigraha (rear enemy), given its geographical proximity and complex relationship with both India and Pakistan. The United States, geographically distant from this immediate sphere of interaction, possesses a comprehensive national power that surpasses that of India, Pakistan, and China. Historically, Washington has strategically navigated the dynamics between these actors, often shaping their interactions in pursuit of its own national objectives.

India has cultivated a strategic partnership with the US, elevating it to the status of a mitra (ally) since the turn of the century, in line with Kautilya's framework that acknowledges the significance of external allies. His enumeration of the seven elements of state power uniquely includes mitra as the final component, a resource to be tapped when internal balancing proves ineffective to achieve foreign policy objectives. The US has reciprocated this alignment, driven by considerable strategic convergences, resulting in a demonstrably strengthening bilateral relationship over the past decade.

From an Indian perspective, the United States is an important strategic partner with growing alignment of interests across several domains, notably in counter-terrorism. Washington, in turn, has witnessed a growing divergence, and even outright contestation, of its interests with Pakistan, primarily due to Islamabad's enduring "[iron brother](#)" relationship with Beijing, America's principal strategic competitor. Against this backdrop, Delhi would have likely anticipated a more robust and unequivocal response from Washington

following the Pahalgam attacks, moving beyond mere condemnation and calls for restraint to a more direct attribution of blame and support for India's security concerns.

Despite Washington's affirmation of "[full support](#)" to Indian Prime Minister Narendra Modi on May 2, its reluctance to explicitly hold Pakistan accountable for its role in fostering terrorism has been conspicuous. This contrasts with the aftermath of the 2019 [Pulwama attacks](#), where Washington adopted a significantly more assertive stance against Pakistan, both in terms of assigning blame and acknowledging India's right to self-defence. Some analysts attribute this shift in response to the absence of a "formally claimed responsibility" by a specific Pakistan-based terrorist group for the Pahalgam attacks, unlike Jaish-e-Mohammed's claim for Pulwama. However, statements from US [Secretary of Defense Pete Hegseth](#) and Vice President JD Vance, hinting at US support for India's right to self-defence post-Pahalgam, suggest that a lack of definitive evidence was not the primary constraint.

### *What has changed?*

Notwithstanding recent vacillation and flip-flops of President Trump, a growing sentiment has emerged within Washington over the past few years, suggesting that its significant [bet on India](#) has not yielded the anticipated returns in countering the dual challenges posed by Russia and China. The proliferation of intense and protracted global flashpoints, and the resulting alignment of major powers on opposing sides, have severely tested India's delicate balancing act. Furthermore, Washington's apparent shift in strategic focus from the Indo-Pacific towards the conflicts in Russia and the Middle East has arguably diluted the strategic convergence that once defined the US-India partnership.

The strategic value derived from the bilateral relationship is evident for both New Delhi and Washington, albeit tempered by an inherent power asymmetry that renders the relationship multifaceted and complex. India, as the relatively weaker partner, is naturally circumspect in its alliance with a stronger power to avoid potential manipulation. Conversely, the

US delicately balances its approach towards its ally, based on the attitude it exhibits. For Kautilya:

"The ally is permanent because of (exclusive) feelings of friendship, fickle because of (his feelings) being common to the enemy, indifferent when not interested in either, with feelings for both when interested in the two."

From Washington's perspective, India remains a significant, albeit smaller, ally. Drawing upon Kautilya's wisdom, a stronger ally (the US) would be advised to bolster the power of an ally who aligns with the *vijigishu* (in this case, the US), manage the growth of an ally who shows potential to become too powerful, ensure that a weak ally remains neither excessively weak nor overly strong, prevent a fickle ally (one equally inclined towards the adversary) from defecting, support a weak ally seeking help from the conqueror and the enemy so that he doesn't turn to the enemy, and assist an ally in crisis to overcome their adversaries independently.

Given Delhi's cautious approach to fully "identifying" with US strategic objectives and its continued growth in power, Washington may be resorting to measures designed to keep India strategically tethered. Arguably, the recent strains in bilateral relations concerning the alleged plot to assassinate a US-based Sikh separatist, the evolving situation in Bangladesh, and the recent re-hyphenation of India and Pakistan with an offer to mediate on Kashmir, could be interpreted as strategic manoeuvres by the stronger ally to subtly influence a weaker ally perceived as unwilling to fully comply.

### *The partnership ahead*

While the convergence of interests between Washington and New Delhi is sufficient to sustain their partnership, it may not be comprehensive enough to entirely bridge the inherent power gap. India, committed to safeguarding its strategic autonomy, will likely continue to navigate its relationships with other major powers, including Russia, based on its own national interests. By the same logic, the US may see strategic value in maintaining a relationship with Pakistan. In the long term, India's demographic dividend, growing economic influence, advancing military capabilities, and expanding diplomatic footprint will likely serve as the enduring anchors that keep the US engaged—driven by

both economic opportunities and geopolitical considerations.

In conclusion, the path forward for the US-India relationship necessitates strategic maturity on both sides, particularly in appreciating the underlying principles guiding the other's strategic behavior. Washington's constructive involvement in India's domestic growth is not only beneficial for New Delhi but also serves America's broader strategic objectives in the subcontinent and the Indo-Pacific. The inherent differences in their approaches to partnerships—India's preference for strategic autonomy versus America's inclination towards alliances—will likely persist as a point of friction. However, viewed through a Kautilyan lens, this dynamic tension might be understood not as a flaw in the relationship, but as a natural consequence of their respective strategic positions and objectives.

*PacNet commentaries and responses represent the views of the respective authors. Alternative viewpoints are always welcomed and encouraged.*



**NEW STRATEGIC HORIZONS FOR THE  
GROWING PHILIPPINES-INDIA  
MULTI-FACETED PARTNERSHIP**

**BY SHRISTI PUKHREM AND DON  
MCLAIN GILL**

**Dr. Shristi Pukhrem** ([shristipukhrem@indiafoundation.in](mailto:shristipukhrem@indiafoundation.in)) is Deputy Director (Academics & Research) at India Foundation. Dr. Pukhrem's research areas covers India-ASEAN relations, India's bilateral relations with the South-East Asian Countries, the Act-East Policy with larger focus on the Indo-Pacific region.

**Don McLain Gill** ([don.gill@dlsu.edu.ph](mailto:don.gill@dlsu.edu.ph)) is a Manila-based geopolitical analyst, author, and lecturer at the Department of International Studies, De La Salle University. He is also an Indo-Pacific Research Fellow at the Asia Pacific Foundation of Canada.

The Philippines and India have witnessed upward trajectory in their bilateral partnership amid growing uncertainty over Indo-Pacific security architecture brought by China's expansionism. While the Philippines' security alliance with the United States remains, there is [an ongoing push](#) in Manila for a more multi-aligned foreign policy preparing for unexpected shifts. The Philippines' growing strategic cooperation with India demonstrates this multi-alignment, and more robust bilateral ties would complement US interests in preserving the regional rules-based order.

### **Tracing the growth**

The Philippines-India partnership is becoming a strategically significant relationship grounded in democratic values, shared security concerns, and converging visions for a free and open Indo-Pacific. This evolution reflects a deliberate recalibration in both countries' foreign policies. For the Philippines,

increasingly wary of China's maritime assertiveness in the South China Sea, the search for reliable security partners has intensified. For India, committed to its Act East Policy and a more proactive Indo-Pacific role, strengthening ties with ASEAN states is both timely and essential.

Maturity in bilateral ties began in 2016 under former President Rodrigo Duterte (2016-2022), when Manila sought to veer away from its US alliance to [appease](#) China and gain economic concessions. Additionally, by downplaying the [2016 Arbitral Award](#), Duterte hoped to forge more stable relations with Beijing in the South China Sea. However, such efforts [did not yield](#) significant economic benefits; they [emboldened](#) China's expansionist ambitions in the West Philippine Sea—as Manila calls the part of the South China Sea encompassing its 200-nautical mile exclusive economic zone. To address this strategic mismanagement, Manila decided to work with non-traditional, like-minded partners that can play a role in Philippines' security.

This diversification policy [allowed](#) the Philippines and India to recognize the utility of their like-minded partnership. Notable developments that took place included the [Philippines' purchase](#) of BrahMos supersonic missiles, more reciprocal high-level visits, and increased maritime activity such as joint exercises and goodwill visits. In Manila, there was apparent willingness to [include](#) India in its security calculations. This complemented India's intent to become a more noticeable player in emerging strategic dynamics in Southeast Asia.

Trade and investment between the two nations, while still modest (around \$3 billion in 2024), is slowly gathering momentum. India's strengths in pharmaceuticals, information technology, and fintech align well with the Philippines' development needs. The digital economy and renewable energy sectors especially offer promising avenues for collaboration. Yet, this economic partnership remains under-leveraged—something both governments are keen to change

### **Institutionalizing the partnership**

When President Ferdinand Marcos Jr. took office in 2022, he [expressed](#) intent to not only maintain positive momentum for the Manila-New Delhi partnership but strengthen it further to better adapt to the changing strategic environment of the Indo-Pacific. Accordingly, the Philippines and India have pursued a more multifaceted, institutionalized bilateral partnership. The most visible area of cooperation centers on maritime security and defense cooperation. This reflected the Marcos Jr administration's [prioritization](#) of security of its sovereignty and sovereign rights as China intensifies belligerent maneuvers in the West Philippine Sea. India likewise intends to bolster its strategic presence in Southeast Asia amid the search for alternative sources of economic and security cooperation, hedging against the uncertainties caused by US-China competition. Additionally, since 2018 India has become more vocal about how China's maritime unilateralism directly challenges the principles of international law.

Consequently, since 2022 there have been [increased](#) Manila-New Delhi maritime security-related activities aimed at deepening and institutionalizing their partnership. First developments included signing a memorandum of understanding for cooperation between the Philippine and Indian coast guards in August 2023. An elevation in defense dialogue followed; the fifth meeting of the India-Philippines Joint Defense Cooperation Committee in September 2024 was for the first time co-chaired by the defense secretaries. Additionally, both nations held their first track 1 maritime security dialogue in December 2024. Moreover, as both nations aim to improve joint preparedness and interoperability, the role of capacity-building is also gaining ground; Manila is currently [negotiating](#) with India to purchase the Akash surface-to-air weapon system. Diplomatic engagement has kept pace. High-level visits, regular dialogues under the Joint Commission on Bilateral Cooperation, and collaboration in ASEAN-led platforms point to a maturing relationship. Importantly, both countries emphasize a rules-based international order and the sanctity of international law—principles increasingly tested in today's contested maritime spaces.

The Philippines and India are also exploring more ways to broaden the bilateral partnership. When President Marcos Jr. met Indian Minister of State for External Affairs Pabitra Margherita in January, he expressed openness to [elevating](#) bilateral ties, indicating Manila's growing importance to the Philippines-India partnership. Manila has also shared plans to pursue cooperation with New Delhi on critical minerals like [nickel](#), given their overreliance on the Chinese market as an export destination. This opens more opportunities for India to become more involved in Southeast Asia while enhancing its partnership with the Philippines.

The human connection is growing, too. Filipino students studying in India under government scholarships, the popularity of yoga and Indian culture in the Philippines, and a small but vibrant Indian diaspora all contribute to a more organic, people-centric partnership. These soft power linkages provide a durable foundation for bilateral goodwill beyond the corridors of power.

### Why it matters to Washington

Under the Trump administration, there are two interrelated themes taking center stage in Washington's foreign policy calculations. First, the future of US security interests lies in the evolving dynamics of Indo-Pacific geopolitics. Second, China is the most critical challenge to Washington's pursuit of strategic objectives in the region and the broader international system. In the Indo-Pacific China not only enjoys a geographic advantage but also continues to consolidate comprehensive power to revise the US-led rules-based order in accordance to its expansionist ambitions in the region.

Despite efforts to manage China's adventurism, Beijing is unwilling to alter its behaviour. In fact, China continues provoking the regional security architecture, particularly in the Western Pacific. Consequently, the Trump administration's approach towards China is based on peace through strength and deterrence. Therefore, it is only practical for the US to invest in its alliances in the region to check China's coercion. Among its vital allies is the Philippines, strategically positioned in the First Island Chain,

making it a direct party to any military conflict in the South China Sea and the Taiwan Strait.

Under Marcos Jr. the Philippines-US alliance enters its [highest level](#) with both nations expanding the nature of their defense partnership. Moreover, with the Trump administration in power, the alliance continues to [deepen and broaden](#) with novel dimensions. While the US is the Philippines' sole and traditional ally, Washington also [encourages](#) Manila to work with other like-minded regional players to provide the Philippines with more capacity-building, preparedness, and interoperability opportunities. This creates opportunities for the Philippines to integrate itself within the traditional hub-and-spokes system by forging robust security ties with Japan, Australia, and South Korea.

While India is not a treaty ally of the US, both democracies have steadily elevated the status of their defense partnership. This close relationship is evident in India's designation as Major Defense Partner in 2016, US provision of weapons, military equipment, and technology transfer, and the operationalization of major logistics agreements. India openly [supports and integrates](#) its major power interests within the US-led rules-based order through its active participation in the Quadrilateral Security Dialogue ("Quad") and other minilaterals in the region and beyond. India is also the only major Indo-Pacific democracy with the material capability and first-hand experience of [pushing back](#) against China's aggression.

Therefore, amid regional geopolitical uncertainty, Washington is more likely to encourage India's active involvement as security partner and provider in the region, giving the Philippines more opportunities and options to enhance resilience, while also complementing US interests in preserving the rules-based order.

## Conclusion

In an era where middle powers increasingly shape regional security architecture, the India-Philippines relationship is no longer a diplomatic footnote—it is fast becoming a strategic necessity. As tensions simmer in the South China Sea and the Indo-Pacific

faces an uncertain future, New Delhi and Manila can not only strengthen their bilateral ties but also contribute meaningfully to regional peace and stability. This partnership would not only benefit both nations but also converge with the overarching network of like-minded nations seeking to strengthen the established US-led order.

*PacNet commentaries and responses represent the views of the respective authors. Alternative viewpoints are always welcomed and encouraged.*



**FORGING US-INDIA PARTNERSHIP  
FOR “RE-ESTABLISHING  
DETERRENCE” IN THE INDO-PACIFIC**

BY MONISH TOURANGBAM & ROB YORK

*Monish Tourangbam*  
([monish.tourangbam@crfindia.org](mailto:monish.tourangbam@crfindia.org)) is a Senior  
Research Consultant at the Chintan Research  
Foundation (CRF), New Delhi.

*Rob York* ([rob@pacforum.org](mailto:rob@pacforum.org)) is Director for  
Regional Affairs at Pacific Forum.

The advent of the second Trump administration has had a defining impact on Washington’s engagement with the rest of the world. The US-India partnership—often called a “defining relationship of the 21st century”—stands at a critical phase with opportunities to scale amid the rapid shifts in global geopolitics, geo-economics, and the exponential growth in dual-use technologies. In the last two decades, the US-India relationship, particularly [its defense ties](#) have seen greater military-to-military interoperability and bigger turnover in terms of defense trade. The last [one-to-one meeting](#) between President Donald Trump and Prime Minister Narendra Modi [in February](#) produced a forward-looking [joint statement](#) that, among many other initiatives, aimed to forge a stronger defense partnership in tune with the demands of the dynamic balance of power in the Indo-Pacific region.

As President Trump, in his second term, recalibrates the US national security and defense strategies amid new

terms of engagement with allies and partners, we argue that the US-India defense partnership has a new opportunity to scale cooperation in interoperability and defense industrial synergy to forge stronger deterrent capabilities in the Indo-Pacific region.

***“Re-establishing deterrence” in the Indo-Pacific***

In [his remarks](#) at the Shangri-la Dialogue in May, US Secretary of Defense Pete Hegseth announced that the US’ priority on foreign policy matters would be the reestablishing of deterrence, especially in (but not limited to) the Indo-Pacific region.

It comes as no surprise that the purpose of this deterrence is countering the influence and the threat of the People’s Republic of China (PRC). Hegseth stressed this administration’s determination, like that of its predecessors, to remain engaged abroad, noting that the prosperity and security of Americans is linked to that of the rest of the Indo-Pacific. The [2025 Annual Threat Assessment](#) of the US Intelligence Community too contends that “Russia, China, Iran and North Korea—individually and collectively—are challenging US interests in the world by attacking or threatening others in their regions, with both asymmetric and conventional hard power tactics...”

In response to this threat, the US will not, in Hegseth’s telling, “preach” to other countries about how they govern themselves, nor does it seek to encircle China or execute regime change. It instead seeks to prevent war, prevent the PRC from carrying out its plans to annex Taiwan, and to do so via “peace through strength”:

“President Trump has also said that Communist China will not invade Taiwan on his watch. So, our goal is to prevent war, to make the costs too high, and peace the only option. And we will do this with a strong shield of deterrence, forged together with you—America’s great allies and defense partners. Together, we will show what it means to execute peace through strength.”

While framed as a break from a previous administration that, in his telling, allowed deterrence to lapse, in at least

one respect Hegseth build on the momentum of [Trump 2.0's predecessor](#): building bilateral ties with India. Hegseth had his [first call](#) with Indian Minister of Defense Rajnath Singh in February, where they stressed “accelerat[ing] our operational cooperation and defense industrial and technology collaboration to deter aggression in the Indo-Pacific,” along with continuing the 2+2 Ministerial Dialogue and concluding the next 10-year [US-India Defense Framework](#) later in 2025.

### *US-India defense partnership for stronger deterrence*

The US-India relationship has seen a number of ups and downs, and the last two decades have been crucial in shaping the current contours. The relationship has the overall support of the major political parties on both sides, and the broader strategic convergence of counteracting China's assertive rise remains broadly intact, which is the mainstay of “re-establishing deterrence.” More than any domain in which the bilateral relationship has grown, the defense sector stands out, through habits of cooperation developed at the tri-service level and the growing defense trade.

Moreover, the two defense industrial conclaves envision greater synergy, with a stronger role from the private sector, by following through on initiatives like the US-India [Roadmap for Defense Industrial Cooperation](#). Private sector partnerships, including between [Lockheed Martin and Tata Advanced Systems](#), [Adani Defence & Aerospace with Sparten \(DeLon Springs LLC\)](#), and between [Mahindra Group and Anduril](#) are examples of how Indian and American firms are coming together to co-produce the necessary goods for meeting the security challenges ahead. Recognizing the disruptive impact of new technologies like artificial intelligence and quantum computing, both sides have also announced the [Autonomous Systems Industry Alliance](#) (ASIA) aimed at scaling “industry partnerships and production in the Indo-Pacific.”

During the last one-to-one meeting between President Trump and Prime Minister Modi, both sides showed intent to push ahead the comprehensive cooperation through the [US-India COMPACT](#) (Catalysing

Opportunities for Military Partnership, Accelerated Commerce & Technology) for the 21st century. From the Biden-era iCET ([Initiative on Critical and Emerging Technologies](#)) to the US-India TRUST ([Transforming the Relationship Utilizing Strategic Technology](#)), a whole-of-government and whole-of-nation approach is envisioned to leverage technologies for partnership in multiple sectors.

The integration of US-origin defense items into India's inventory in the last two decades appears significant, despite bureaucratic processes of defense sale and purchase that needs fixing from both ends. From heavy-duty transport aircrafts, high-end attack helicopters, complex combat vehicles, missile systems and long endurance unmanned systems, the partnership is growing in sea, land and air based military assets. The partnership will remain extra crucial in developing India's anti-submarine warfare capabilities in the Indian Ocean, along with other surveillance and reconnaissance systems for a more robust maritime domain awareness. Crucial follow-up will be required to realize the benefits of the announcements made to “to streamline defense trade, technology exchange and maintenance, spare supplies and in-country repair and overhaul of US-provided defense systems” and opening negotiations on a reciprocal defense procurement.

The Trump administration sounds bullish on the [prospects of improving](#) “accountability and transparency through the foreign defense sales systems to ensure predictable and reliable delivery of American products to foreign partners and allies in support of US foreign policy objectives.” Therefore, it is imperative for Washington and Delhi to work harder on a better alignment of their strategic objectives in the Indo-Pacific region that would, in turn, help streamline their vision of co-development and co-production in defense products and heightened cooperation in “overseas deployments of the US and Indian militaries in the Indo-Pacific, including enhanced logistics and intelligence sharing.”

The US Congress-mandated [Commission on the National Defense Strategy](#) last year, among other things, proposed a US “multi-force theater construct” to enable warfighting in simultaneous conflicts with multiple adversaries, and a pitch for an augmented use of the

private sector in the US defense industrial base. Therefore, for a critical stakeholder and major defense partner like India, how Washington's "re-establishing deterrence" pans out in the next few years will be crucial, for scaling the growing bilateral defense cooperation, and in minilateral groupings, such as the Quadrilateral Security Dialogue.

India and the United States will likely never be fully aligned on matters of security cooperation, as their differing responses toward Ukraine and Islamic terrorism originating from Pakistan illustrate. However, these differences of opinion should not distract them, as both face a long-term challenge from a PRC that seeks to rewrite the rules of the Indo-Pacific region so crucial to both Delhi and Washington. Furthermore, as major Indo-Pacific powers with large populations and the resources, both countries are well-situated to complement one another's efforts to deter Beijing's revisionism.

The early signs from the Trump administration's interactions with the Modi government are promising and it is imperative that the momentum between them continue.

*PacNet commentaries and responses represent the views of the respective authors. Alternative viewpoints are always welcomed and encouraged.*



## ***NAUTICAL GAMES: THE GREAT NICOBAR ISLAND PROJECT (PART I)***

**BY MOHAN MALIK**

**Dr. Mohan Malik** ([maliks5865@gmail.com](mailto:maliks5865@gmail.com)) is Professor of Strategic Studies at the UAE National Defence College and Non-Resident Fellow at the NESACenter for Strategic Studies. From 2001 to 2019, he was a Professor in Asian Security at the U.S. Defense Department's Asia-Pacific Center for Security Studies (APCSS) in Honolulu. His books include *China and India: Great Power Rivals* (Lynne Rienner, 2011) and *Maritime Security in the Indo-Pacific* (Rowman & Littlefield, 2014). The views expressed here are those of the author.

On the same day President Trump lamented on [Truth Social](#) that “we have lost India and Russia to deepest, darkest China,” Singapore’s Prime Minister Lawrence Wong, on official visit to New Delhi, [appreciated India’s interest](#) in joint naval patrols in the strategic Malacca Strait—highlighting the enduring nature of China-India rivalry shaping Asia’s future.

This came close on the heels of announcement of [India’s multi-billion-dollar project](#) to build a transshipment port, airport, power plant, and township on the Great Nicobar Island (GNI)—located astride the busy Malacca Strait—thereby underscoring intent to leverage geography for strategic advantage. The Strait provides the shortest sea route between the Middle East and East Asia. It gives New Delhi a strategic perch over the Six Degree Channel, the narrow passage through which up to 60% of global trade and most of China’s energy imports flow. The Andaman and Nicobar chain of 572 islands (ANI), stretching from Myanmar to Sumatra, serves as India’s natural maritime fortress, with Great Nicobar offering New Delhi a forward base between the South China Sea and northern Indian Ocean. By developing

the island chain, India aims both to counter China’s naval expansion and to transform Great Nicobar into “India’s [Singapore](#),” a growth hub for the Bay of Bengal and a pivot in its Indo-Pacific strategy.

### **Playing politics with geopolitics**

However, as is often the case with most mega-projects in India, the \$9.6 billion Great Nicobar project has also become embroiled in controversy. Congress leader Sonia Gandhi has denounced it as a “[planned misadventure](#),” citing the trampling of tribal rights, environmental destruction, and legal bypasses. Critics warn of damage to coral reefs, sea turtle nesting grounds, and the displacement of the Shompen tribe. Yet Congress’s opposition takes on a deeper significance when viewed against the party’s still-secret 2008 MoU with the Chinese Communist Party, signed in the presence of Xi Jinping. Going by the CCP’s MoUs elsewhere, that pact likely bound both parties to consult and avoid actions detrimental to the other’s strategic interests—fueling speculation that Congress’s stance may align, intentionally or not, with China’s strategic interests. At its core, the debate pits ecological survival against geopolitical goals. For its part, the ruling Bhartiya Janata Party frames the project as a strategic imperative: an unsinkable aircraft carrier at the mouth of the Malacca Strait, vital for India’s naval reach, power projection, and Indo-Pacific posture, dismissing Congress’s opposition as obstructionist at best, and at worst, inadvertently advancing Beijing’s regional ambitions.

### **Ground zero**

The Bay of Bengal and the Malacca Strait are indeed the ground zero in [India-China maritime rivalry](#). Encounters between their navies in the Indian Ocean are becoming more frequent. Beijing sees the Great Nicobar project as a threat—extending India’s naval and economic reach in the eastern Indian Ocean and challenging Beijing’s bid for regional dominance. Chinese research and fishing vessels have been mapping the seabed for submarine deployments in the Indian Ocean. In 2019, the Indian Navy expelled a [Chinese research ship](#) operating near the Andaman Islands. In neighboring Myanmar, India’s development of Sittwe port and China’s construction

of Kyaukphyu port illustrate the intensifying contest for strategic footholds. The littoral states of the Bay of Bengal now find themselves increasingly entangled in the rivalry between Asia's rising powers.

This maritime rivalry must be seen against the backdrop of China's expanding naval ambitions. Chairman Xi Jinping envisions sea power as central to restoring China's "rightful place" in the world. With over 370 warships and submarines, China now possesses the [world's largest navy](#), eroding U.S. predominance at sea. Having consolidated its hold over the South China Sea by militarizing artificial islands, China's navy has now set its sights on the Indian Ocean. As China's economic interests have grown, so has its military presence in the Indian Ocean. Over the past decade, China has maintained a [continuous presence](#) of 10–12 warships, submarines, and research vessels on average.

### China's Indian Ocean

Chinese strategists wax lyrical about resurrecting Admiral Zheng He's 15th-century expeditions to the "Western Ocean" (the old name for the Indian Ocean). Beijing's cultivation of friendly, pliant regimes along the Indian Ocean littorals through economic inducements and strategic pressure mirrors the Ming dynasty's past attempts to control the trade routes by altering political regimes in Malacca, Sumatra, and Sri Lanka so as to facilitate commercial and political dominance. Retired [Rear Adm. Yin Zhuo](#) advocates building "at least five to six aircraft carriers" to maintain "two carrier strike groups in the West Pacific Ocean and two in the Indian Ocean." At the same time, American strategist Alfred Thayer Mahan's theories of sea power inform [China's Belt and Road Initiative](#), aimed at securing overseas markets, resources, and bases. Beijing has poured investment into ports in Cambodia, Thailand, Myanmar, Bangladesh, and Sri Lanka, while projecting an even [stronger naval presence](#) across the western Indian Ocean—from the Maldives and Pakistan to Djibouti and Africa's east coast—positioning itself astride critical maritime chokepoints. By securing port access, conducting anti-piracy patrols, and supplying military hardware to littoral states, China is steadily entrenching itself as a "[resident power](#)" in the Indian Ocean. The launch of

the China–Indian Ocean Forum in 2022, notably excluding India, underscores Beijing's determination to shape regional dynamics without accommodating its southern rival.

Part II in this series will explore the consequences of these developments, and offer recommendations.

*PacNet commentaries and responses represent the views of the respective authors. Alternative viewpoints are always welcomed and encouraged.*



## ***NAUTICAL GAMES: THE GREAT NICOBAR ISLAND PROJECT (PART II)***

BY MOHAN MALIK

**Dr. Mohan Malik** ([maliks5865@gmail.com](mailto:maliks5865@gmail.com)) is Professor of Strategic Studies at the UAE National Defence College and Non-Resident Fellow at the NESACenter for Strategic Studies. From 2001 to 2019, he was a Professor in Asian Security at the U.S. Defense Department's Asia-Pacific Center for Security Studies (APCSS) in Honolulu. His books include *China and India: Great Power Rivals* (Lynne Rienner, 2011) and *Maritime Security in the Indo-Pacific* (Rowman & Littlefield, 2014). The views expressed here are those of the author.

Confronted with a heavily militarized land frontier that erupted into clashes in 2020, India's Great Nicobar project signals that Chinese pressure along the Himalayas could carry significant costs at sea—through the chokepoints that carry most of China's trade and energy—thereby strengthening New Delhi's overall deterrence vis-à-vis Beijing.

### **Containment begets containment**

India has also unveiled plans to expand its naval fleet from 140 to over 200 by 2035—an [ambitious buildup](#) to secure its seas, including four nuclear submarines and three carrier battle groups—deployed in the Arabian Sea, Bay of Bengal, and northern Indian Ocean. The tri-service Andaman and Nicobar Command (ANC) at Port Blair and the Island Development Agency are transforming the archipelago into a forward military base and economic hub. The island already hosts the Indian Navy's INS Baaz airbase. Since 2017, the Indian Navy has maintained round-the-year, mission-ready

deployments near key maritime chokepoints and has conducted joint exercises with Japan, the U.S., Australia, and Southeast Asian partners, emphasizing anti-submarine warfare to track Chinese submarines transiting from the Western Pacific into the Indian Ocean. India's participation in the QUAD's Indo-Pacific Partnership for Maritime Domain Awareness, the US-led Combined Maritime Force in the Arabian Sea, and arms transfers to Vietnam and the Philippines further enhance its deterrence posture.

The Indian Navy's Maritime Infrastructure Perspective Plan aims to transform minor island detachments on ANI into fully developed maritime hubs. Upgrades to airfields, jetties, and military facilities will link the archipelago to major trade routes while enhancing surveillance and rapid-response capabilities across the Andaman Sea and Bay of Bengal. These measures reinforce India's Act East Policy and its commitment to a “free and open” Indo-Pacific, while turning a remote outpost into a linchpin of India's maritime power and [strategic reach](#). Despite tensions over trade and Russia, defense cooperation remains a cornerstone of [India-US relations](#). India's planned \$4 billion purchase of six additional P-8I aircraft, supplementing its existing fleet of 12, will enhance anti-submarine warfare and surveillance in the eastern Indian Ocean, especially when deployed from the Nicobar Islands. As part of this effort, plans are afoot to deploy an initial network of unmanned surface vessels patrolling key sea routes and chokepoints by March 2026, strengthening early-warning and situational awareness.

By the end of 2027, Andaman Port will include [liquefied natural gas storage facilities](#), providing additional energy security for military and civilian vessels. Complementing this, India has invited Japan to invest \$30 million (4.02 billion yen) through an Official Development Assistance program, reflecting deepening cooperation in maritime infrastructure and security. Tokyo is boosting cooperation with both India and Southeast Asia, with reported investments in the Andamans and Indonesia's Sabang port. The Andamans are poised to anchor a coordinated surveillance network across the Malacca, Sunda, Lombok, and Ombai-Wetar Straits, leveraging India's archipelago alongside Australia's Cocos (Keeling)

Islands, cementing their role as a cornerstone of India's integrated deterrence strategy.

### Nautical games

Once fully implemented, the Great Nicobar project could prove to be a masterstroke. Economically, it aims to position India as a major hub in global shipping and logistics on par with Colombo and Port Klang, reducing reliance on foreign ports that drive up costs and delays. The potential offshore deposits of cobalt, nickel, copper, and manganese further enhance the project's significance, offering a path toward mineral self-sufficiency at a time when China's near-monopoly on rare earths and [export restrictions threaten India's industrialization](#). Strategically, the project counters China's growing naval investments in Cambodia, Myanmar, Sri Lanka, Pakistan, and Africa while enhancing India's maritime and underwater domain awareness across the eastern Indian Ocean. By aligning economic and security goals, Great Nicobar enhances India's deterrence against China.

Beijing, for its part, [watches warily](#) as India deepens tighter security ties with Southeast Asian littorals, Japan and Australia. China perceives the Nicobar development ominously as aggravating its "Malacca Dilemma." Following India's 2018 strategic investment in Indonesia's Sabang port, near the northwestern entrance to the Malacca Strait, China's *Global Times* [warned](#) that Beijing would not "turn a blind eye" if New Delhi sought "military access" to Sabang, cautioning that India could "entrap itself into a strategic competition with China and eventually burn its own fingers." Just as the U.S. and allies cannot let China dominate the Western Pacific, China will resist India's influence in the eastern Indian Ocean. For, whoever dominates the Andaman Sea controls the Malacca Strait. Expect Beijing to counter the project through support for domestic critics in India, calibrated military countermeasures, and diplomatic pressure on Myanmar, Thailand and Bangladesh. Circumventing American and Indian defenses and penetrating the Andaman Sea are crucial to China's Indian Ocean goals.

### An enduring rivalry

In short, as China's navy goes south to the Indian Ocean, India's navy is moving east toward the Pacific. For both powers, forward presence has acquired greater salience in their national security strategies to achieve situational awareness in areas of strategic interest. For Beijing, this means having a presence in the Indian Ocean; for New Delhi, having a naval presence in the Pacific is critical to its strategic deterrence against Beijing, particularly since \$66 billion worth of exports and roughly one-third of India's trade transit through the South China Sea.

India's Great Nicobar project is more than an infrastructure initiative; it is a strategic gambit to monitor key maritime chokepoints, counter Beijing's naval expansion, and enable rapid deployment of naval and air assets as a first security provider. Unlike the United States and India, which have never gone to war, Beijing and New Delhi share a long history of clashes over territory, strategic space, and competing visions of Asia and the world—their tensions sharpened by the widening economic and military gap between them. India's trade deficit with China is almost three times the size of its trade surplus with America. Despite occasional tactical thaws, mutual containment will remain the defining feature of their relationship, from the Himalayan heights to the depths of the Indian Ocean. Their rivalry is not episodic but structural and will remain the central axis of Asian geopolitics. If the 20th century's geopolitical competition played out across the Atlantic and Pacific, the 21st century's geopolitical contestation is unfolding in the Indian and Pacific Oceans.

Should Trump's America choose retrenchment, ceding spheres of influence to Russia in Europe and China in Asia, the consequences would be profound: Beijing's appetite for risk-taking and expansion, after consolidating control over the First Island Chain, will grow—making the northern Indian Ocean as contested and conflict-prone as the South China Sea and compelling India to deepen counter-containment with partners such as Japan and Russia. History shows that even a weaker and more isolated India did not kowtow to China; with far greater capabilities today, New Delhi is even less likely to do so in the future.

## Conclusion and recommendations

The Great Nicobar project is New Delhi's clearest signal yet that it intends to contest—not partner with—China in the Indo-Pacific. It is also a litmus test of India's ability to integrate economic development with national security imperatives despite formidable domestic and external challenges. Success will hinge on aligning domestic political will with state capacity and international partnerships, while blunting Chinese efforts to stoke local dissent. As China entrenches itself as a resident power in the Indian Ocean, it is in the interests of the United States, Japan, Australia, and the Southeast Asian littorals to back a joint Indo-Pacific Maritime Infrastructure and Surveillance Initiative (MISI). Such an initiative would enable real-time maritime and underwater domain awareness, while integrating logistical upgrades—ports, LNG hubs, and repair facilities—across strategic island outposts in the eastern Indian Ocean. MISI would complement India's Act East policy and America's Indo-Pacific Strategy, while drawing in Japanese and Australian co-financing for resilient infrastructure in the Nicobars and across the wider littoral. Crucially, it would bolster regional defenses against Chinese expansion without requiring formal alliances or risking overextension.

*PacNet commentaries and responses represent the views of the respective authors. Alternative viewpoints are always welcomed and encouraged.*



**SECURING DIGITAL LIFELINES:  
RESILIENCE FOR INDIA AND OTHERS  
IN THE AGE OF CABLE SABOTAGE**

BY BRENDON J. CANNON

*Brendon J. Cannon ([brendon.cannon@gmail.com](mailto:brendon.cannon@gmail.com)) is an academic with expertise in international security, geopolitics, and the Indo-Pacific, with a particular focus on global power distributions, regional security dynamics, and the interplay between security and emerging technologies.*

When two major undersea communication cables were severed in the Red Sea in early September 2025, service degraded across a broad swath from Saudi Arabia to India. Voice over IP (WhatsApp, Zoom, Teams), email, social networks, cloud services, and enterprise software all slowed, delaying transactions and traffic between global headquarters, subsidiaries, and data centers (e.g., Microsoft, Google, Amazon Web Services). My near-instant connection in Abu Dhabi dropped while I tried to speak with a colleague in Honolulu—13,600 km (about 8,500 miles) away—on Zoom. While a minor inconvenience, it illustrates how reliant we are on cables—thin as a garden hose, stretching some 1.7 million kilometers beneath the oceans, and carrying over 95 percent of global data.

The [proximate cause](#) was the Southeast Asia–Middle East–Western Europe 4 (SMW4) and India–Middle East–Western Europe (IMEWE) cables being severed near Jeddah, Saudi Arabia. Repairs can take weeks: specialized vessels must reach the site, locate the breaks, lift the cable, splice, and test before full-service returns. Timelines are constrained because only about 60 repair ships operate worldwide. Satellite workarounds offer limited relief; even low-Earth-orbit constellations carry only a small fraction of international traffic.

While no group claimed responsibility, the incident coincided with heightened Red Sea tensions, including ongoing Houthi attacks on international shipping and related regional military responses. The Houthis [denied responsibility](#) for a similar cut in 2024 after the sinking of MV *Rubymar*. Taken with cable damage in the Baltic Sea in 2023–2024, these episodes underscore the vulnerability of undersea cables and suggest cable disruption as a plausible hybrid-warfare vector—over 95% of cable damage each year comes from accidental, manmade damage such as dragging anchors, or environmental damage such as earthquakes. The policy challenge is to bolster resilience without overreaction—to de-risk while preserving beneficial interdependence.

### **India's exposure and chokepoints**

The Red Sea cuts again highlighted India's status as a frontline, highly vulnerable state. As India becomes a digital superpower, it relies on cables transiting the Red Sea and Arabian Sea to link its expanding digital economy to Europe, North America, East Asia, and beyond. The SMW4 and IMEWE cuts slowed traffic to and from India and exposed dependence on routes that pass via chokepoints.

Chokepoints are narrow bodies of water that cables must cross to reach wider seas. They [include](#) the Bab el-Mandeb Strait at the entrance to the Red Sea and the Strait of Hormuz at the entrance to the Persian Gulf. While many global chokepoints exist (e.g., the Istanbul Straits, Straits of Florida, Strait of Gibraltar), India and other Indian Ocean states obtain much of their connectivity via routes through and around the Red Sea and Persian Gulf, as well as the Strait of Malacca near Singapore.

India's vulnerability both mirrors and surpasses most other Indian Ocean littoral states. Unlike Pakistan, Oman, or Tanzania, India's large service economy depends on continuity in outsourcing, cloud computing, and fintech. Reliable, low-latency connectivity is [fundamental to economic well-being](#), growth, employment—and national security—one reason India joined Japan, Australia, and the US in declaring the Quad Partnership for Cable Connectivity and Resilience in May 2023. In crises,

New Delhi depends on assured communications across the armed forces, ministries, and the civilian leadership, as well as with partners such as Japan. Cable cuts can severely curtail that capacity—even short of war.

### **Cable sabotage is rarely straightforward**

Emphasizing India's susceptibility alone risks missing a larger point: sabotaging long, multi-landing cables rarely produces neat, targeted outcomes. Breaking the Red Sea's SMW4—an 18,800-km system linking Marseille and Palermo to countries across Asia and North Africa—degraded connectivity not just for India but also for Pakistan, Saudi Arabia, Kuwait, the UAE, and others. Latency was reported across the Arabian Peninsula, though several governments did not publicly confirm degradation.

Deep-water cutting is technically challenging—if you wish to cut a cable, the easiest place to do it is at the landing sites where cables make landfall and connect to data centers and the terrestrial network that links to us. But cutting a cable at a landing station is also an attack on a state's territory, which may lead to retaliation. Rather than imagining submarines with “scissors,” it is more useful to examine documented outages. “Two-party” effects occur mostly where routes are short, bilateral, or minimally redundant—such as between small island states (e.g., Tonga, Cook Islands) or within smaller seas like the Baltic and Black Seas. In November 2024, the cut to C-Lion1 (Finland–Germany) primarily affected those states; around the same time, the BCS East–West Interlink (Lithuania–Sweden) was also cut, with Lithuania harder hit because it supplied about a third of national bandwidth. By contrast, long, multi-landing trunk cables in the Red Sea propagate disruption far more widely; the early-2024 incident associated with the sinking of MV *Rubymar* reportedly cut three cables and led to outages from East Africa to Southeast Asia, including India.

Some may argue that non-state armed groups like the Houthis care less about outcomes than overall “shock and awe” effect.” But in general, adversaries in the international system try to degrade an opponent without self-harm or collateral damage to partners.

Sabotaging lengthy, multi-landing cables that touch both sides almost guarantees spillovers—not just in one country but also in neighbors that share the route.

### **Avoiding fragmentation**

The specter of cable sabotage is real, but the answer is not to harden into rival blocs or redraw maps so that “our” networks never touch “theirs.” Fragmentation erodes interdependence—the feature that historically discouraged deliberate attacks—and paradoxically raises incentives to target long, “their-only” routes.

A worrisome trend is the move toward a bifurcated ecosystem that avoids landfall in China (including Hong Kong, once a favored landing site). The Apricot cable—backed by a consortium including Google, Meta, and NTT—will span roughly 12,000 km to connect Japan, Taiwan, Guam, the Philippines, Indonesia, and Singapore, purposefully avoiding China. While concerns over Chinese control and surveillance are real, building a de facto bifurcated network may increase—not reduce—vulnerability. Fragmentation reduces shared exposure and can lower expected self-harm to an attacker, thereby raising the strategic appeal of sabotage.

Today, interdependence and extensive redundancy and routing arrangements make it difficult to impose clean, targeted costs on India, Japan, or the US without blowback. As networks bifurcate and reciprocal exposure declines, the cost–benefit calculus shifts. By the time Apricot is operational, sabotage along routes that largely bypass China could, in theory, impose costs on others while limiting blowback to China. Extend this 10–20 years and a more segmented map emerges; if bifurcation proceeds, cable sabotage becomes more plausible—and more tempting—as attackers exploit a fragmenting network. In short, fragmentation weakens deterrence by eroding mutual vulnerability.

### **Conclusion**

The increase in cable cuts around Eurasia is worrying. They demonstrate the risks of heightened instability and the possible beginning of the end of our interconnected world. They also showcase the

vulnerability of critical infrastructure like undersea cables as targets in hybrid warfare. India may become a frontline state as its economic growth and sovereignty increasingly rest on uninterrupted connectivity. But it doesn't need to be this way. For nearly 80 years, undersea cables have not only been largely invisible to the public but remained secure. They are not more vulnerable all of a sudden. Rather, they were apolitical and embedded within a more cooperative, interdependent system. Despite rising tensions, states should avoid letting great-power rivalry from dismantle this foundation. If the undersea cable ecosystem that has served us so well becomes fragmented, the consequence will likely be more sabotage, not less.

*PacNet commentaries and responses represent the views of the respective authors. Alternative viewpoints are always welcomed and encouraged.*



## ***A REVITALIZED INDIA OCEAN STRATEGY CANNOT IGNORE AFRICA***

**BY MICHAEL RUBIN**

**Michael Rubin** ([MRubin@AEI.org](mailto:MRubin@AEI.org)) is director of policy analysis at the Middle East Forum and a senior fellow at the American Enterprise Institute.

On May 30, 2018, Secretary of Defense Jim Mattis [announced](#) that, “in recognition of the increasing connectivity, the Indian and Pacific Oceans, today we rename the US Pacific Command to US Indo-Pacific Command.” His logic was solid. China’s strategic competition does not end at the Strait of Malacca, the Timor Sea, or Tasmania.

US defense doctrine embraced the changes easily and continues to build upon a more holistic approach to the Indian and Pacific Ocean basins. The Quadrilateral Security Dialogue (“Quad”), an outgrowth of cooperation and communication born after the 2004 tsunami, became a strategic force during President Donald Trump’s first term. President Joe Biden overlaid the Quad framework with the Australia-United Kingdom-United States (AUKUS) strategic framework. The problem with both formulations, however, is that they tended to focus upon the eastern Indian Ocean, where the threat of Chinese expansionism was most apparent. Given Chinese “salami-slicing” in the South China Sea and China’s growing belligerence toward Taiwan, such a focus might be understandable. Chinese ambition, however, is pan-regional if not global. On Aug. 1, 2017, China established its first overseas military base in Djibouti, just a few miles from Camp Lemonnier, home to the US Combined Joint Task Force-Horn of Africa and the primary base of operations for US Africa Command. While Chinese strategists have often talked about China’s “String of Pearls” as peaceful and economic in motivation, the People’s Liberation Army Navy (PLAN) permanent presence in Djibouti suggested a greater ambition. With a logistic hub in Djibouti, the PLAN can access the entirety of the Indian Ocean basin, operating in the eastern Indian Ocean from its South Sea Fleet headquarters in Zhanjiang and its subsidiary based in Yulin and Longpo, and in the Western Indian

Ocean and Red Sea from its Djibouti base. The willingness of Cambodia to give China access to the Ream Naval Base in Sihanoukville on the Gulf of Thailand also furthers China’s reach, as does Mauritius’s increasingly warm ties to China.

In this context, the British transfer of the Chagos Islands to Mauritius is strategically incongruent, especially as history and cultural links [do not support](#) Mauritius’ claim. Even British officials are hard-pressed to explain why Prime Minister Keir Starmer reversed London’s position to support Mauritius’ claim. What might have been his virtue signaling to a progressive, anti-colonial base could have profound ramifications in the strategic balance of the Indian Ocean, as it makes the future of the joint US-UK military base on Diego Garcia in question, especially if China continues to increase its influence in Mauritius, India’s airfield in Agaléga notwithstanding.

With China expanding its reach, neither the United States nor India can any longer afford to take the western Indian Ocean and its littoral African states for granted. The second term Trump administration has given lip service to a more expansive Indo-Pacific Strategy. The November [2025 National Security Strategy](#), for example, called on India to be more proactive in Indo-Pacific security and declared “keeping the Indo-Pacific free and open, preserving freedom of navigation in all crucial sea lanes” to be a goal of US strategy. However, the fact that the Strategy treated Red Sea navigation almost as an afterthought and then addressed it only in the context of Middle East challenges suggests continued incoherence. After all, Sudan, Eritrea, Djibouti, and Somaliland are African; their postures and security can impact freedom of navigation as much as Yemen and Saudi Arabia do.

On Jan. 23 the Pentagon released its new [National Defense Strategy](#). Its importance is not only about what it says but also what it omits. While the Strategy mentions China almost two dozen times, it does not explicitly mention India. It sidelines Africa, with its few references relegated to counterterrorism. It does, however, continue a broad focus on the “Indo-Pacific Region” and calls upon the United States to “deter China in the Indo-Pacific” and to “set the military conditions required to achieve the [2025] NSS goal of a balance of power” in the region.

Absent a more sustained focus by the United States or her chief strategic allies, Washington will forfeit that balance of power.

Trump's tariff policy and his embrace of Asim Munir, Pakistan's army chief of staff, has shaken US-India bilateral ties. New Delhi essentially has a choice: it must be proactive in the western Indian Ocean to deny space to China or it must coordinate with the United States to the same end goal.

New Delhi must determine how to outcompete Beijing not only in Mauritius and South Africa, but also in Kenya and Tanzania. While India commissioned the INS Jatayu in 2024 on Mincoy Island in the Lakshadweep Islands, it should push its military footprint further, not only expanding its military footprint in Agaléga but also replicating it should China use its investments in Mauritius to leverage India out, but also expanding its presence in northern Madagascar and using its considerable if underutilized diplomatic and financial power to establish its own permanent naval base on Zanzibar or in Mombasa.

Indian politicians—especially old guard officials with a more left-of-center outlook—might scoff at such military expansion, but the goal is not presence, but rather the growth and soft power ties that security can bring. An Indian base in Mombasa or Zanzibar would naturally attract follow-on Indian investment that would quickly become a hub for deeper commercial penetration in Africa. If the Democratic Republic of Congo holds [\\$24 trillion](#) in untapped minerals, metals, and rare earths, there is no reason why New Delhi and Washington should cede the field to Beijing. Indeed, Trump's second-term [efforts](#) to make peace in Africa's Great Lakes region is predicated on an ability to tap Congo's strategic resources. Indeed, this might also represent a formula for US-Indian cooperation in Africa, with the United States taking the lead in the interior and India developing its resources along the coast, all toward a common aim based in trade, free markets, regional development, and security.

India's initial refusal to recognize Somaliland seems a [strategic own goal](#) on the part of its Ministry of External Affairs. The Ministry's statement explaining, "India has longstanding ties with Somalia. We continue to underline the importance of respecting sovereignty and territorial integrity of the country," suggests ignorance of history and law. Somalia and Somaliland represent a failed confederation akin to the United Arab Republic and Senegambia. In both those cases, India reverted recognition to their constituent parts as the federations failed. India's endorsement of Mogadishu, too, stands in direct contradiction to the precedent it set when it recognized Bangladesh's independence. For India to embrace Somaliland, alone or in conjunction with the United States, would send a signal that India will protect its interests in the entirety of the Indian Ocean Basin and will compete with China. Simply having a presence would raise costs to China and force Beijing to recalculate its interests and outlays. For India to control a Naval Base with the United States controlling the nearby airfield could help develop interoperability and cooperation long after the current bilateral tension dissipates.

Even if India does not want to enter Somaliland—though the United States might do so regardless—Mozambique remains a fertile ground for strategic development. Rwanda has largely defeated the Ansar al-Sunna/Islamic State-Mozambique insurgency. A social factor behind the initial eruption of insurgency was the northern

Cabo Delgado's traditional underdevelopment. But it is gas-rich, and Pemba has a natural deep-water harbor. Given the traditionally warm ties between New Delhi and Maputo, India might be the perfect investor to develop the region to mutual benefit of India, Mozambique, and the local people in Cabo Delgado.

The United States can issue National Security Strategies and National Defense Strategies and believe it is countering China, but rhetoric alone will not counter Beijing's ambitions, nor will a narrow focus on an Indo-Pacific Region that in practice excludes everything west of Kanyakumari (Cape Comorin).

If the White House is going to counter or roll-back Chinese influence, it must first choose whether it will do so alone or repair its frayed ties with Prime Minister Narendra Modi's government to work in partnership. If the latter, then there needs to be a discussion about division of labor: Will India take the lead on the littoral states and the United States focus on the interior? Should the United States and India, as democracies, embrace Somaliland? What new military bases are needed and where? With the Chinese already entrenched in Djibouti, security in the Indian Ocean will not begin and end with threats from the South China Sea or a Chinese presence in the Bay of Bengal.

*The Pilot commentaries and responses represent the views of the respective authors. Alternative viewpoints are always welcomed and encouraged. Please write to [rob@pacforum.org](mailto:rob@pacforum.org) for more information on how to contribute.*



## **THE IMPACT OF THE INDIA-ISRAEL PARTNERSHIP ON US STRATEGIC INTERESTS**

**BY JASON M. OLSON, PH.D.**

*Jason Olson ([jason.m.olson19@gmail.com](mailto:jason.m.olson19@gmail.com)) holds a Ph.D. in Near Eastern and Judaic Studies from Brandeis University, where his research focused on the role of Christian Zionism in US foreign policy. His first book, "America's Road to Jerusalem," was published in 2018, and his second, "The Burning Book," won a global award in creative nonfiction.*

The February 2026 meeting between Indian Prime Minister Narendra Modi and Israeli Prime Minister Benjamin Netanyahu is a pivotal event that strongly supports the strategic objectives of the US 2025 National Security Strategy (NSS). The NSS prioritizes a strategic pivot to the Western Hemisphere, which is enabled by empowering key US partners to manage regional security and stability. The deepening India-Israel alliance, reinforced by frameworks like the I2U2 Group and Netanyahu's "hexagon of alliances," is central to this burden-sharing model. This partnership enhances US interests by building a resilient technological and defense ecosystem, creating a strategic economic corridor to counter China, and balancing destabilizing forces in the Middle East and Indo-Pacific.

### **The US strategic framework: The 2025 National Security Strategy**

The 2025 NSS marks a shift in US foreign policy, focusing resources on the Western Hemisphere to counter narco-terrorism, hostile foreign incursions (especially from China and Russia), and border insecurity. This "America First" doctrine is enabled by a de-pivot from Asia, which requires key allies like India to take primary responsibility for their regions. India is identified as a linchpin partner, expected to secure the Indian Ocean Region and counter revisionist powers. This allows the US to reduce its forward deployments while ensuring its interests are protected by capable partners.

### **Pillars of the India-Israel partnership**

#### **1. Technological and defense cooperation**

The partnership combines India's market and software talent with Israel's advanced innovation, creating a force multiplier for US interests.

- **Democratic tech ecosystem:** Joint ventures in AI, robotics, and semiconductors are crucial for building resilient supply chains independent of China. Key examples include an MoU for high-tech cooperation, the Adani Group's partnership with Tower Semiconductor for a chip plant, and a \$150 million deal for Edge AI chip co-development. This supports India's "Make in India" mission and US strategy, with one visible example being the \$2.75 billion American investment in the Micron semiconductor plant in Gujarat.
- **Defense co-production:** The India-Israel relationship has evolved from a simple buyer-seller dynamic to deep co-production. A prime example is the Drishti-10 Starliner, an Indian-made version of Israel's advanced Hermes-900 UAV, assembled by an Adani-Elbit joint venture. By inducting these drones, the Indian Navy enhances its maritime surveillance, empowering India to act as a net security provider in the Indian Ocean. Another example occurred in October 2025, when US and Indian naval aviation units conducted a first-ever bilateral training exercise near Diego Garcia, a main platform for American power projection into the Indian Ocean Region. US Navy P-8A Poseidon and Indian Navy P-8I aircraft participated in combined drills focusing on anti-submarine warfare and enhancing maritime domain awareness, strengthening interoperability between the two forces. This increased combined capability reduces the operational burden on US forces, fulfilling a core tenet of the 2025 NSS.

## 2. Geoeconomic architecture

- **India-Middle East-Europe Economic Corridor (IMEC):** Announced at the G20 Summit, IMEC is a strategic alternative to China's Belt and Road Initiative. It establishes a transparent, financially stable trade route connecting key US partners: India, the UAE, Saudi Arabia, Jordan, Israel, and the EU. The project's urgency is highlighted by Houthi attacks on Red Sea shipping. Tangible progress included a February 2024 agreement between India and the UAE to advance the corridor, which is projected to reduce India-to-Europe shipping times by 40%. Israel's Haifa Port is the final link in the chain, connecting the Middle East to Europe via the Mediterranean Sea.
- **Regional alliances (I2U2 & "hexagon"):** Formations like the I2U2 Group (India, Israel, UAE, USA) and Netanyahu's "hexagon of alliances" formalize this cooperation. I2U2 is already mobilizing private capital for major projects, including a \$2 billion investment in tech-enabled food parks in India and a 300 MW renewable energy project. These alliances of peace and prosperity can be reinforced by Saudi Arabia's pragmatic Vision 2030, which requires regional stability and should make it a willing IMEC partner. India should encourage Saudi Arabia to use its power to complete IMEC's hard and soft infrastructure.

### India's role in regional stability

India's sophisticated foreign policy of "multi-alignment" allows it to build issue-based coalitions with competing powers, making it a unique stabilizing force.

- **Countering extremism:** The India-Israel-Arab bloc serves as a formidable counterweight to the "radical Shiite axis" led by Iran. Simultaneously, India's management of Iran's Chabahar Port provides a strategic trade route to Central Asia that bypasses Pakistan and prevents China from filling a vacuum. In a time of strong regional tension, this nuanced engagement could remind Tehran of the possibility of participation in a peaceful regional framework and offer it a constructive alternative to its own destabilizing and self-destructive activities.
- **Balancing the "Sunni Islamist axis:"** The India-Israel partnership also dampens the influence of the "emerging Sunni Islamist axis." India offers a powerful alternative through its model of "dharmic democracy," a pluralistic framework that stands in contrast to the exclusionary and imperial ideologies promoted by groups like the Muslim Brotherhood. Militarily, India's demonstrated ability to neutralize advanced Turkish-made drones used by Pakistan signals its capacity to counter threats from this axis. Israeli innovation could help India deter Islamist aggression in ever-hot Kashmir region, ultimately harnessing the leverage to maintain stability there.

### Conclusion and recommendations

The growing strategic partnership between India and Israel is a cornerstone of the US strategy to build a more stable, partner-led

regional order. It empowers India to secure its neighborhood, counters the influence of China and other destabilizing actors, and creates resilient economic networks. This allows the United States to reduce its military footprint abroad and redirect resources to its priority focus: the Western Hemisphere. The Modi-Netanyahu summit, therefore, represents a practical and significant step in advancing long-term US national security interests.

To secure the Indian Ocean Region in line with US interests, India and Israel should deepen their strategic partnership. By combining their hard power, moderation, and advanced technology, they can create a stable, partner-led security architecture. The critical next step is for India to support Israel's emergence as a middle power, welcoming its security role beyond the Middle East and into the Indo-Pacific. Strengthening combined India-Israel naval and air power is the key to realizing this vision, which would reduce the burden on US forces and allow for the reprioritization of American strategic focus.

*\*This article represents the author's views alone and does not represent the policies of the US Government.\**

The Pilot commentaries and responses represent the views of the respective authors. Alternative viewpoints are always welcomed and encouraged. Please write to [rob@pacforum.org](mailto:rob@pacforum.org) for more information on how to contribute.



## **THE VIEW FROM INDIA: THE IRAN WAR FORGES A NEW INDO-PACIFIC**

**SIDDHARTH SINGH**

**Siddharth Singh** ([siddharth@indiafoundation.in](mailto:siddharth@indiafoundation.in)) is Senior Research Fellow, India Foundation. He is also Assistant Editor of the India Foundation Journal.

The US-Israel-Iran war was initially regarded in India as a West Asian crisis with global implications, but that description is no longer valid. The war is reconfiguring geopolitical and geoeconomic alignments across the Indo-Pacific. In the last decade, all debates on the Indo-Pacific have been centered around China's rise, military balances in the Western Pacific, and the diplomatic interpretation of a "[free and open Indo-Pacific](#)." However, this war has made clear that one cannot understand the Indo-Pacific by looking at the region from the South China Sea or Western Pacific because its western anchor is in the Gulf and the Arabian Sea, where energy supplies, important sea lanes, and naval deployments bind West Asia to the Indo-Pacific's economic jugular.

The war tests the political and strategic foundations of the Indo-Pacific order where three vulnerabilities now converge in a single crisis. First is the structural dependence of Indo-Pacific economies on Gulf oil and gas. Second is the finite capacity of the US to fight in West Asia while preserving maximum deterrence against China. Third is the fragility of multi-alignment strategies through which middle powers, particularly India, seek to balance competing relationships without being trapped in blocs.

These factors make the war a strategic stress-test for the Indo-Pacific.

### **US strategic distraction and erosion of Indo-Pacific deterrence**

The immediate effect of the war is that US naval assets are drawn down from the [Indo-Pacific command and moved toward CENTCOM](#). The Western Pacific is left relatively thin when deterrence relies on visible reassurance. This is not to suggest that

overall US commitments to the Indo-Pacific are unraveling but does suggest the availability of a limited pool of high-end naval assets. The credibility of alliance systems is judged not only by the language of treaties, but whether forces can show up in the right place and right time. China watches this very closely, and will likely treat the crisis as hard evidence of the limits of American bandwidth. Despite overall US military and naval strength the practical problem of maintaining deterrence at two places at once is real when one theater begins absorbing aircraft carriers, missile-defense assets, surveillance platforms, and senior policy-level attention.

### **Energy security and chokepoint vulnerability**

Approximately [20 million barrels of oil](#) pass through the Strait of Hormuz every day and nearly 90% heads to refineries in Asia or the wider Indo-Pacific. The closure of the Strait is a core Indo-Pacific energy security challenge and, to tackle it, the Indian Ocean should not be treated as a secondary or supporting maritime theater. The Indian Ocean is a single, integrated strategic space, in which turbulence in the western Indian Ocean is rapidly transmitted across the Arabian Sea, along important shipping lanes, through the Malacca Strait, and out into the wider Indo-Pacific region.

Once the ships started re-routing from Strait to other shipping lanes after the start of the war the ripple effects spread across the Indo-Pacific, because re-routing added time and fuel consumption, leading to an increase in insurance premiums, more need for naval escorts, along with disruption in commercial ship schedules and thus bottlenecks at all major ports and other critical maritime chokepoints. These problems [directly impact inflation, freight rates](#), industrial planning decisions, and the confidence of stock markets across the Indo-Pacific. Although the Indo-Pacific region has developed a sophisticated diplomatic vocabulary around Indo-Pacific strategy, an equally robust architecture has not been developed for protecting the sea lines of communication on which the economic prosperity of the Indo-Pacific depends. [Japan, South Korea, and Taiwan remain exposed](#) to acute vulnerabilities largely due to Gulf crude and LNG continuing to underpin their electricity generation, heavy industry, and macroeconomic stability. Strategic petroleum reserves for countries in the Indo-Pacific offer a short-term buffer during crisis but are not enough to shield

economies from the inflationary and fiscal impact of an extended disruption. If the Strait of Hormuz remains blocked, the consequences will bite through higher electricity prices, manufacturing costs, and increasing political pressure on governments across the region, many of whom already struggle with fragile growth and tough economic conditions.

China's exposure to the war, however, is far more complicated and multi-faceted than any simplistic win or loss accounting for Beijing. China profits from a distracted US, freeing up space for Beijing in the Western Pacific and in regional diplomacy in the Indo-Pacific. But China is also [deeply dependent on Gulf hydrocarbons and oil flows from Iran](#), and any serious disruption in the Gulf threatens China's energy security and economic stability; this leaves Beijing facing a paradox where it can profit from America's distraction and overextension, but is simultaneously and materially exposed to any major disruption in the energy supply.

### India's multi-alignment test

India, however, is at the analytical epicenter because no other major power has a comparable dependence on Gulf hydrocarbons, a 9-million-strong diaspora in the GCC countries with high remittance exposure, and a declared ambition to operate as a [net security provider](#) in the western Indian Ocean. India is arguably the country that best straddles the intersection of energy risk, maritime vulnerability, and diplomatic opportunity. The ongoing war is a genuine test of Indian statecraft. For years, New Delhi has pursued multi-alignment policy through building close relationships with Tehran, Tel Aviv, Riyadh, Abu Dhabi, and Washington simultaneously, and the strategy has largely paid off. India has acquired a broad diplomatic space without getting locked into one camp, but this war now puts that entire multi-alignment calculus to test. The challenge for India in the current crisis is no longer about maintaining its relationships in balance, but whether New Delhi can use its relationships to gain real strategic benefits on three fronts: securing energy supplies, protecting its diaspora, and contributing meaningfully to regional stability. Diplomatic flexibility is no longer enough; India must complement its strategic autonomy with real capabilities on land and at sea if it is to function as a major Indo-Pacific power. This means building bigger strategic petroleum reserves, having credible plans for large-scale evacuations of Indian nationals during crisis, and strengthening maritime domain awareness. This would require a more persistent naval presence, and creating enough naval escort capacity in the western Indian Ocean to secure India's most critical shipping routes and firmly establish India as a net security provider in the western Indian Ocean.

### Regional diplomacy and order building

The ongoing conflict in the Middle East also exposes the limitations of regional institutions in the Indo-Pacific. For example, the Quadrilateral Security Dialogue's core agenda is cooperation on technology, supply-chain resilience, and humanitarian assistance but it has not formed any response to the current crisis, whose center of gravity is in the western Indian Ocean. ASEAN has also fallen back on its default [call for restraint](#) by all parties. Other groupings like the Indian Ocean Rim Association and Indian Ocean Naval Symposium carry diplomatic heft, but do not possess the structures, mechanisms, or capabilities to conduct large-scale escort operations or meaningful maritime stabilization efforts across the wider Indo-

Pacific. These dynamics are moving the Indo-Pacific further toward a truly multipolar order. In the future such multilateral or minilateral Western-led frameworks and initiatives in the Indo-Pacific will no longer hold de facto primacy in shaping the Indo-Pacific region's strategic landscape and we may witness the emergence of new minilaterals.

Some effects will be temporary. Carrier battle groups will be recalled, shipping lanes will resume accustomed routes, and stock markets will claw back lost ground but the war's structural impacts will be more lasting. This war may thus be a turning point; the first real-world sustained test of whether the Indo-Pacific can stick together strategically when the United States is preoccupied. This test will determine whether Indo-Pacific prosperity can withstand real coercion at in the Strait Hormuz, while assessing whether middle powers can continue hedging without investing much more in hard military capability, and whether regional institutions can finally move from declarations to real tools of crisis management on the ground and at sea.

### Conclusion

For India, policy implications are immediate: accelerate the build-up and expansion of strategic petroleum reserves, operationalize connectivity projects like India–Middle East–Europe Economic Corridor as a hedge against volatile sea routes, and institutionalize regular maritime coordination in the western Indian Ocean with capable, like-minded partners like France and Japan etc. New Delhi should use its unique diplomatic access across rival camps not just to keep everyone on its side, but demonstrate that a major Indo-Pacific power can influence the course of a crisis, rather than simply bear its costs.

India should start the process by initiating a common understanding on safe passage for commercial tankers through the Strait, decoupling it from the ongoing war or ceasefire. India can propose a maritime rules-of-the-road instrument to maintain merchant traffic through the Strait because New Delhi alone holds working channels with Tel Aviv, Tehran, Riyadh, Abu Dhabi, and Washington. The Indian Navy can provide enforcement and deconfliction protocols. This deliverable, while seemingly small, be disproportionately large as it will help in overcoming energy crisis in Indo Pacific.

However, the larger lesson for the Indo-Pacific from ongoing war is that West Asia and the Indo-Pacific are not two separate strategic theaters connected by trade, but form a single strategic system in which a war in one arena swiftly reshapes deterrence, energy security, and alignment behavior in the other. The Indo-Pacific that emerges from this war will be more multipolar, more vulnerable to maritime and energy coercion, and more reliant on shared distributed energy-security cooperation than the one before. The war will, eventually, end but the strategic indivisibility it has exposed is here to stay.

*The Pilot commentaries and responses represent the views of the respective authors. Alternative viewpoints are always welcomed and encouraged. Please write to [rob@pacforum.org](mailto:rob@pacforum.org) for more information on how to contribute.*



## ***FROM DELHI'S WATCHTOWER: THE TRUMP-XI SUMMIT AND INDIA'S ENDURING VIGILANCE***

**BY SRIPARNA PATHAK**

*Prof. (Dr.) Sriparna Pathak (sriparnapathak@gmail.com) is a Professor of China Studies, and the founding Director of the Centre for Northeast Asian Studies at O.P. Jindal Global University, (JGU) Haryana, India. She also serves in the capacity of a Senior Fellow, at the Jindal India and an Associate Director at the Motwani Jadeja Institute of American Studies at JGU.*

In mid-May 2026, US President Donald Trump concluded his state visit to Beijing with the familiar optics: handshakes in the Great Hall of the People, declarations of “very successful” talks, and a high-profile American business delegation in tow. Yet the summit produced precisely what many in New Delhi had expected—symbolism without substance. No major new trade agreements beyond vague tariff easements. No firm outcomes on the Iran conflict or reopening the Strait of Hormuz. Taiwan differences persisted. And no overarching G2 framework emerged to dictate global rules.

From India's vantage point, this was a measured relief. It confirmed that Washington now treats China less as a primary strategic rival requiring containment and more as a complex economic partner essential for supply chains, critical minerals, and global market stability amid multiple crises. Trump's transactional focus on “fantastic trade deals” highlighted this shift. Beijing gained some economic breathing room while promoting its preferred narrative of cooperative great-power relations.

This flirtation with G2 dynamics raises legitimate concerns in New Delhi. A true duopoly between the world's top two economies could sideline rising powers like India, Japan, South Korea, and many others, limiting the strategic space. However, the summit's thin results, marked by underlying mistrust, modest deliverables, and no transformative joint initiatives, suggest any G2 condominium remains aspirational rather than operational. For India, this

reinforces the wisdom of strategic autonomy: building comprehensive national power independently rather than relying on great-power bargains.

### **China as persistent threat: The view from the Himalayas and the Indian Ocean**

While the US recalibrates toward managed interdependence with China, India's assessment remains firmly grounded in geography and history. The 2020 Galwan incident and prolonged Ladakh standoff laid bare the limits of border management agreements. Though 2025–2026 brought tactical stabilizations, including resumed patrols in select areas and renewed diplomatic mechanisms, core challenges endure: no mutually agreed-upon clarification of the Line of Actual Control (LAC), sustained forward deployments, and asymmetric Chinese infrastructure development.

Recent developments confirm this pattern. The 35th Working Mechanism for Consultation and Coordination (WMCC) meeting in Beijing on May 27 this year yielded “constructive and forward-looking” discussions. Both sides expressed satisfaction with the maintenance of peace and tranquility, paving the way for gradual normalization. Yet Indian assessments note persistent gaps: no breakthrough on delimitation, continued gray-zone activities, and China's reluctance for equitable boundary resolution. Tactical calm masks unresolved strategic distrust.

India's response is proactive and visible in the Great Nicobar Island project. This ambitious multi-billion-dollar initiative, including a major transshipment port at Galathea Bay, international airport, township, and supporting dual-use infrastructure, enhances India's maritime posture near the Strait of Malacca. Located roughly 150 kilometers (95 miles) from this vital chokepoint, the project bolsters monitoring, logistical resilience, and power projection capabilities.

Chinese analysts openly acknowledge that the project sharpens Beijing's longstanding Malacca Dilemma, China's vulnerability stemming from its heavy reliance on the strait for energy imports and trade. By positioning India to better oversee this critical sea lane, Great Nicobar complicates China's Indian Ocean ambitions and counters its regional port strategy. Amid ongoing Hormuz

disruptions, accelerating the project underscores New Delhi's commitment to securing its own sea lanes and reducing external dependencies.

Further examples illustrate India's consistent threat perception. Accelerated border infrastructure development (roads, bridges, and habitations), enhanced Quadrilateral Security Dialogue ("Quad") maritime domain awareness initiatives, and supply-chain diversification continue unabated. High tariffs on many Chinese imports and rigorous FDI scrutiny persist, reflecting a prudent approach shaped by a live border dispute, unlike America's more compartmentalized economic engagement.

### **Trump, definitional agendas, and the Thucydides Trap lecture**

The summit also exposed risks in how Washington sometimes absorbs Chinese framing. Xi Jinping reportedly emphasized the "Thucydides Trap," invoking the risk of conflict between a rising and an established power while advocating a "new type of major-power relations." This classic Beijing narrative reframes competition as a misunderstanding best resolved on Chinese "win-win" terms, subtly advancing its peer-status claims and downplaying issues like military modernization and assertiveness in contested waters.

Trump's positive tone and deal-making emphasis suggested some rhetorical alignment with this definitional agenda, prioritizing economic complementarity. For India, this is a familiar tactic seen in border talks, where China portrays disputes as minor differences while advancing facts on the ground. The US economic pivot does not diminish the value of Indo-US defense and technology ties, but it reinforces the need for Indian self-reliance. New Delhi has been and must continue to calibrate its China strategy based on its own realities, not fluctuating American priorities.

### **India's path forward: Autonomy amid flux**

Ultimately, the Trump-Xi summit, with its limited outcomes, validates India's strategic clarity. The absence of a robust G2 preserves multipolar space for India to emerge as an independent pole. Under Prime Minister Modi, India has adeptly balanced deepened US partnerships in the Indo-Pacific, all the while advancing Atmanirbhar capabilities.

Recent engagements further illustrate this balanced approach. Secretary of State Marco Rubio's late-May 2026 visit to India, culminating in the Quad Foreign Ministers' Meeting in New Delhi on May 26, reaffirmed the grouping's vitality through a substantive joint declaration. The Quad partners announced ambitious initiatives, including a joint port development project in Fiji to enhance infrastructure in Pacific Island nations and a Critical Minerals Initiative Framework targeting up to \$20 billion in investments for diversified supply chains. These steps underscore India's proactive role in building resilient regional architectures alongside like-minded partners.

Going forward, priorities are clear: fully realize Great Nicobar's potential, expand Indian Ocean naval presence, diversify critical technologies and minerals, and strengthen minilateral and bilateral ties with Japan, Australia, Europe, and ASEAN. Credible deterrence along the LAC continues, alongside open diplomatic channels, for sustained communications.

India remains open to dialogue and practical cooperation with like-minded powers on shared concerns such as maritime security and supply chain resilience. However, it will not adjust its core national priorities or long-standing threat perceptions of adversaries based on the shifting whims of even its closest partners. New Delhi's strategic calculus is rooted in its own geopolitical realities and interests.

The United States may view China through a transactional G2-lite lens, but India confronts a neighbor with a strategic culture oriented toward long-term dominance in its region. Until Beijing demonstrates concrete respect for India's interests, including fair boundary resolution, balanced trade, and non-encroachment in the Indian Ocean, as just a few to name, New Delhi's vigilance will remain undiminished. The Trump-Xi meeting altered little in this regard.

In this age of great-power pragmatism, India's approach stands distinct: pragmatic engagement paired with relentless capacity-building. The Himalayas and the approaches to Malacca require nothing less. India's ascent does not depend on summits in Beijing or Washington, as it is being secured through its own determined efforts.

*The Pilot commentaries and responses represent the views of the respective authors. Alternative viewpoints are always welcomed and encouraged. Please write to [rob@pacforum.org](mailto:rob@pacforum.org) for more information on how to contribute.*



## **INDIA MUST REMAIN STRATEGICALLY AUTONOMOUS IN THE PAX SILICA FRAMEWORK**

**BY RAMI NIRANJAN DESAI**

**Rami Niranjan Desai** ([ramidesai@gmail.com](mailto:ramidesai@gmail.com)) is an anthropologist and a scholar of South Asia and the Indo Pacific. She is a columnist and author and presently Distinguished Fellow at India Foundation, New Delhi.

India's formal entry into the Pax Silica framework in February 2026 marks a decisive shift in its geopolitical posture from cautious equidistance to selective technological alignment. By embedding itself within a US anchored semiconductor and AI ecosystem, New Delhi has taken a calculated step toward accessing advanced technology networks that will accelerate its rise in an era where computing power and chip supply chains define strategic influence. But this alignment comes with embedded asymmetries; it would be naïve to see Pax Silica as merely a cooperative framework. It has the potential to become an architecture of control designed to secure trusted supply chains while restricting access to adversaries. In such systems, hierarchy is typically structural with decision-making concentrated at the core. For India, the greatest risk is not being left out but being incorporated on unequal terms.

The danger lies in mistaking access for autonomy. Participation in advanced supply chains does not automatically translate into technological sovereignty. Without a deliberate strategy, India risks being confined to lower the lower end of the value chain, such as assembly, testing, and packaging (ATP), and market consumption while remaining dependent on external actors for high-end design, fabrication, and AI computing capacity (or “compute”). In effect, it could trade one form of dependence for another, replacing China-centric vulnerabilities for Western ones.

India must therefore move beyond traditional notions of non-alignment and embrace “networked strategic autonomy.” This is not about disengagement but about structuring interdependence on favorable terms. This requires India to leverage Pax Silica for

capability acquisition while at the same time diversifying partnerships, investing in domestic ecosystems, and retaining policy independence in areas such as export controls, digital governance, and critical technology regulation. Equally important is India's role as a rule-shaper. If Pax Silica evolves into a bloc that sets standards, New Delhi must take care that it has a seat at the decision- and policy-forming table to set the agenda for AI and semiconductor security and supply chain governance. Otherwise, it risks becoming a rule-follower in a system that will increasingly govern the global technological order. Done correctly, Pax Silica offers India a pathway to the frontlines of the 21st century's most consequential technological competition.

For a country like India, still developing its semiconductor and AI capabilities, Pax Silica clearly offers relief from earlier “Tier 2” restrictions that limited access to high-performance GPUs and constrained domestic AI development. In effect, it opens the door to scale. Yet, this access carries the risk of an autonomy deficit. India could risk slipping into a “subcontractor trap” in which it supplies data, talent, and market depth while control over intellectual property, advanced fabrication, and high-end design remain with the West. The problem could be structural, because if India remains dependent for compute and fabrication—while contributing primarily at the lower end—its strategic leverage will remain limited.

Data sovereignty presents another non-negotiable front for India. While Pax Silica encourages cross-border data flows, India's Digital Personal Data Protection Act of 2023 must remain the governing authority over any data involving Indian citizens. Further, integration into global data pipelines should not dilute domestic jurisdiction regardless of where the data is being processed. It is possible that complying with Pax Silica's collaborative monitoring framework risks exposing highly sensitive national infrastructure data. This includes insights into grid topology, peak loads, operational data, and energy allocation priorities, which could reveal critical grid vulnerabilities to external parties.

Similarly, India must preserve autonomy in export controls. The Special Chemicals, Organisms, Materials, Equipment and Technologies (SCOMET) framework is India's national export

control list and regulatory framework for dual-use goods with both civilian and military applications which may be used as weapons of mass destruction. This framework reflects a country agnostic about multilateralism—as well as alignment with unilateral export control regimes—which risks constraining India's ability to engage with longstanding partners such as Russia and Iran without exposing it to the threat of secondary sanctions. As Indian firms integrate deeper into a US-anchored semiconductor and AI ecosystem it is possible that they would become subject to extraterritorial reach of US export control laws irrespective of their compliance with SCOMET. This, in other words, could create a “compliance trap” resulting in “regulatory friction” where Indian firms may be compliant with domestic law but may become vulnerable to extraterritorial US enforcement.

Finally, the task for India should be to convert access into capability. Pax Silica can be a catalyst but needs to be accompanied by deliberate capacity building. To safeguard its long-term interests, India will have to make sovereign choices across critical technological domains. This begins with the ability to develop indigenous architectures and standards. Initiatives such as *Atmanirbhar Bharat* and *India First* lose strategic meaning if coalition frameworks implicitly lock India into reliance on US certified cloud systems or chip providers for AI training and deployment. Technological alignment cannot come at the cost of design independence. Equally vital is the protection of critical infrastructure. As AI systems become embedded in sectors such as energy, demands for standardization could extend into sensitive areas like grid monitoring, potentially exposing critical data and operational vulnerabilities. India must preserve the right to reject frameworks that enable external visibility into such systems.

Ultimately, India's leverage within Pax Silica lies in its vast consumer market, deep design talent, access to critical minerals and an emerging leadership role in next-generation technologies such as 6G. These are not the attributes of a junior partner but of a system-shaping actor capable of mediating between competing technological blocs. A country of such capabilities can and should structure alignment on equitable terms.

For India to realize its ambition of becoming a *Viksit Bharat* (“Developed India”) by 2047 it must ensure that its technological foundations are built on negotiated strength, where integration enhances sovereignty rather than eroding it. Negotiation, it must be noted, is a quality India has displayed many times in the recent past.

*The author acknowledges the use of AI tools in editing, but the ideas remain their own and the content has been evaluated to ensure accuracy and originality.*

*The Pilot commentaries and responses represent the views of the respective authors. Alternative viewpoints are always welcomed and encouraged. Please write to [rob@pacforum.org](mailto:rob@pacforum.org) for more information on how to contribute.*



## CHINA FALLS SHORT AS A GLOBAL SOUTH “PUBLIC GOODS” PROVIDER

BY OORJA TAPAN

*Oorja Tapan ([oorjatapan20@gmail.com](mailto:oorjatapan20@gmail.com)) is Senior Research Fellow at the School of International Studies, Jawaharlal Nehru University, New Delhi.*

In June 2026, China’s State Council Information Office [released](#) the white paper “More Just and Equitable Global Governance: China’s Principles, Proposals and Actions.” Beneath the language of consultation and shared benefit, the white paper makes unusually direct claims: “China will always be a member of the Global South,” and “in the Global South its roots will remain.”

With this, Beijing again formalizes its long-implied bid to lead the developing world.

The bid answers a real grievance. Institutions built after 1945 underrepresent the countries that now drive global growth—the Global South plays an [outsized role](#) in the world economy in terms of purchasing-power and growth, yet it remains a junior partner in bodies like the IMF, World Bank, and UN Security Council (UNSC). China has not invented this demand for reform but is channeling it. The Global Governance Initiative (GGI) is one of Chinese leader Xi Jinping’s “Global Initiatives,” after those on development, security, and civilization—a sequenced architecture for an alternative order, now with its governance capstone in place.

The conventional anxiety in Western minds about China’s rise is [Thucydidean](#)—that a rising power and the ruling power are fated for conflict. But this white paper requires a different lens. In economic historian Charles Kindleberger’s account, the [catastrophe of the 1930s](#) owed less to any single aggressor than to a vacuum: Britain could no longer provide the public goods underwriting a stable global order, and the United States would not. [Joseph Nye](#) later distilled this into the “Kindleberger Trap”—that a rising China would be too weak or unwilling to contribute public goods commensurate with its power.

The [white paper](#) is China’s answer to—and a clever inversion of—that charge. It catalogues how a “certain major power” has withdrawn from international bodies, defunded them, blocked UNSC resolutions and paralyzed the World Trade Organization’s dispute settlement mechanisms. Against this backdrop, China presents itself as the provider stepping into the breach and bills the GGI itself as “another significant public good that China has contributed to the world.” The trap, Beijing implies, has been sprung not by Chinese under-provision but American retreat—and China is filling the gap.

Substantively, China is the [largest](#) troop contributor to UN peacekeeping among the permanent members of the UNSC and the second-largest funder of its peacekeeping budget. Its clean energy exports have driven down the global costs of wind and solar power. Through an expanded BRICS, the New Development Bank (NDB)—[\\$42.9 billion](#) in approved loans [across](#) 139 projects by March 2026—and a Belt and Road [network](#) across more than 150 countries, it supplies development finance few others can match.

But the Kindleberger frame cuts both ways, and a genuine public good is non-excludable and non-rivalrous—its benefits cannot be withheld, and one country’s use does not diminish another’s. Much of what China supplies fails that test. Belt and Road infrastructure is rivalrous and loan-financed; it carries debt exposure and travels with a creditor’s—China’s—[leverage](#). It binds the recipient to the provider. “Sovereignty” rhetoric runs into the same wall: the initiative’s flagship corridor, for example, runs [through territory](#) claimed by India, which is why India remains the largest economy in the Global South to have stayed out of the BRI altogether. China may answer the Kindleberger trap in volume while reproducing hierarchy in kind—goods supplied, but with strings that recreate the very dependence the post-war order’s “rise of the Global South” was meant to dissolve.

This is where the contest’s second contender matters, and the white paper’s silences are telling. For all its talk of a rising Global South, China’s white paper [names](#) India exactly once—in passing, as a co-founder of the NDB. India is the one other power positioned to claim a leadership role in the developing world, though that claim is

contested: As a G20 economy that spent a decade drawing closer to Washington—an alignment now strained by tariffs—India has not been an obvious champion for the poorest countries. Still, since 2023 it has convened [successive](#) Voice of Global South Summits, and its G20 presidency delivered what years of Chinese advocacy had not: a seat for the [African Union on the G20](#) table. Now, China’s white paper credits Beijing with “taking the lead” in supporting that outcome.

India’s primary export to the Global South is not *physical* infrastructure but digital public infrastructure—the open, low-cost identity and payment systems behind Aadhaar and Unified Payments Interface (UPI), now [offered](#) to other developing economies through a consensus [framework](#) and repository advanced under India’s G20 presidency. In Kindleberger’s terms, these come closer to true public goods: cheaper to adopt than a port or power plant and run by the adopting state rather than the provider. The model is not without its critics—Aadhaar has drawn sustained scrutiny [over privacy](#) and [exclusion](#) at home, and its export footprint remains modest next to the Belt and Road’s.

But where China’s digital offer is organized around [data sovereignty and state control](#), codified in this white paper’s calls for a Beijing-hosted data organization and a [Chinese-led AI governance](#) framework, India’s [creates fewer dependencies](#) on the provider. It is a different proposition, even if a smaller one.

Both bids have moved from paper to practice. At the [World AI Conference](#) in Shanghai July 17-20, with Xi Jinping in attendance, the white paper’s call became an institution: The agreement establishing the World Artificial Intelligence Cooperation Organization was signed. This became the first intergovernmental body on AI, headquartered in Shanghai and aimed squarely at the Global South’s “AI divide” (Xi also pitched it as an [alternative](#) to the US’ Pax Silica, even if he avoided naming Washington). New Delhi’s counter dates to [February 2026](#), when it hosted the first AI Impact Summit in the Global South. The rule-writing is already underway, although Beijing seems to be holding a faster pen.

That points to a difference that is reputational rather than economic. China has settled most of its land borders—the conspicuous [exceptions](#) are India and Bhutan, which remain hot issues even with the current thaw in bilateral ties. The India-China frontier saw deadly clashes as recently [as 2020](#), and China has reportedly built settlements inside [disputed Bhutanese](#) territory. Add the maritime disputes in the South China Sea, and Beijing arrives in parts of the developing world carrying a record of unresolved sovereignty quarrels, alongside a [debt-trap reputation](#)—deserved or not—that it has struggled to shed. India’s frictions, by contrast, lie largely within [South Asia](#), where smaller neighbors at times bristle at New Delhi’s weight, complicating any clean-hands narrative close to home. But across Africa, Latin America, and much of Southeast Asia, India is less reputationally encumbered than Beijing. In a contest run partly on trust, that is an asset—though not, on its own, a decisive one.

So what might India do? Make digital public infrastructure the [centerpiece](#) of its Global South offer rather than a sidenote, while the developing world’s digital guardrails are still being chosen. Give the Voice of Global South Summits real institutional weight—a secretariat, a financing arm, a delivery record that outlasts the summits’ communiqués. Use the seats it already holds—starting

with the one at the head of the table. [India chairs](#) BRICS this year and hosts the bloc’s summit in New Delhi in September, a chairship [Beijing has publicly](#) backed. Add its membership in the Shanghai Cooperation Organization and the G20, plus its status as a leading [shareholder](#) in the Asian Infrastructure Investment Bank and NDB, and India can shape reform from within rather than ceding the drafting completely to Beijing. Whether it will affect sustainable change is uncertain; its financing is a fraction of China’s, its initiatives are often longer on symbolism than machinery, and its instinct for strategic distance has left it on the sidelines of the debates it could shape.

The New Delhi summit in September is the nearest test.

For Washington, the temptation will be to read all this as drift. A BRICS Summit which brings Vladimir Putin and quite possibly Xi Jinping to New Delhi in September looks like a partner hedging, weeks after the US [levied](#) a fresh 10% duty on Indian goods on July 24. The Kindleberger lens points the other way. The Beijing white paper’s catalogue of American retreat stings because much of it is accurate. Washington, at present, does not seem to be competing in this provision contest at all. That makes India’s offer the only one on the table that is compatible with the liberal world order the US once built but no longer wishes to pay for. The US can back India’s offer at low cost. Both New Delhi and Washington describe signing the trade deal [as 1%](#) short of done. What the US can do is turn [June’s Pax Silica assurance](#)—that Indian access to American AI would not be switched off—into a standard policy, so the developing world’s digital rails run on open standards backed by American computing capacity rather than on a Shanghai-headquartered alternative that now exists.

None of this is a forecast of Indian success. China provisions at a scale India cannot approach and may yet convert that durable volume into durable leadership. But the white paper frames the contest more narrowly than it is. The question for the Global South is not only who supplies the most, but who supplies goods that do not come with a lien attached. On terms, rather than volume, the answer is still open, and that is the contest India can actually compete in—and the one Washington should want it to win.

*The Pilot commentaries and responses represent the views of the respective authors. Alternative viewpoints are always welcomed and encouraged. Please write to [rob@pacforum.org](mailto:rob@pacforum.org) for more information on how to contribute.*



## **THE RECALCITRANT ALLY: WHAT INDIA THINKS ABOUT AMERICA AFTER THE WAR IN IRAN**

**BY HINDOL SENGUPTA**

*Hindol Sengupta ([hindol.sengupta@gmail.com](mailto:hindol.sengupta@gmail.com)) is professor of international relations at O. P. Jindal Global University in India.*

On Raisina Hill, one question about America echoes these days: Forget what other people think America wants; does America still know what it wants?

It used to be said, for at least two decades, that the India-America relationship is “inevitable.” An entire generation of policymakers, analysts, and scholars in both countries grew up surrounded by assertions of this certainty. But it is now widely acknowledged that things have not been the same since war began between Russia and Ukraine, and hit some unprecedented low points with the war in Iran.

There were always, especially in the sinews of the state, older voices in Delhi who were hardened with Cold War wisdom and more skeptical, and these days it seems their voices are stronger than they have been for years.

At the heart of the trepidation lies a critical question—whose interests does the US today consider before it lurches into conflict? From India’s vantage point, just when it was recovering after months of extreme pressure on the purchase of Russian oil and gas, including tariff attacks from the Trump administration, the war with Iran plunged the world’s sixth-largest economy into crisis due to the repeated shutting down of the Strait of Hormuz.

When the United States and Israel attacked Iran in February 2026, India was not a belligerent. It had been steadily building up its relationship with Iran, a country with whom it has old civilizational ties, and which was strategically important for Delhi, including as a fuel source. India was investing in the key [Chabahar Port](#) in Iran, a

counter to Gwadar in Pakistan—the end point of the China-Pakistan Economic Corridor, only 125 miles away.

All of this, of course, went for a toss, as they say, when the war immediately made a deeply unwilling India a stakeholder. The Strait of Hormuz—the chokepoint through which about half of India’s crude oil and 90% of LPG (liquified petroleum gas) imports pass—was shut as Iran fought back using its stranglehold on the vital waterway, only 60 miles wide at its widest point, shooting oil prices [above \\$100](#) a barrel and threatening the kind of imported inflation that has historically been the most politically dangerous vulnerability of any Indian government.

For a country working to boost its economy consistently to rise to [middle-income status](#) and [double its per capita income](#), aimed at pulling millions of people out of poverty, this is not merely an economic crisis, it is an existential one. India knows only too well what kind of turmoil economic inflation could cause. In neighboring Bangladesh, destabilized by energy prices following the Russia-Ukraine war, the longstanding government of Sheikh Hasina collapsed following massive street riots. Hasina is still [in exile](#) in India.

Therefore, New Delhi does not take economic shocks due to global conflict lightly. Especially where even its citizens are [being killed](#), like some were during the Iran war—with not a word of regret from the US.

Through it all, New Delhi has not really protested. There is a simple geopolitical reason: In the moving chessboard of geopolitics, it is still closer today to the United States (India’s biggest bilateral trade partner) and Israel (with which the Narendra Modi government has an ever-strengthening friendship and deepening security and business ties). And this—still—provides something of a balance against China, which is vital for India.

Like many around the world, India is waiting, with as much restraint as it can muster, to see how the remaining term of President Donald Trump will pan out. Many in India also wait to see the fate of the Republican Party in the American midterm general elections later this year. India sees no virtue in aggravating any tussle with Trump,

whose approval rating is steadily declining—but considering Trump’s history, it is also clear that nothing can be taken for granted at this moment in American politics.

But there are lessons from this whole saga that will not disappear easily within the Indian system. Key among these is that leaning toward Washington did not spare India the costs of the relationship’s underlying asymmetry, and in this the post-war period has been genuinely instructive for how Indian strategic thinking now regards the United States. Even as India absorbed the economic shock of the Hormuz disruption and positioned itself rhetorically alongside the US and Israel, the Trump administration continued to treat India as, primarily, a trade adversary to be pressured rather than a security partner to be cultivated. The additional tariffs imposed on India over its continued purchases of Russian oil—even as Washington itself issued sanctions waivers permitting Indian refiners to buy Iranian and Russian crude “already on the water” to stabilize global markets—exposed the incoherence, from an Indian point of view, of an American approach that demanded loyalty while offering little accommodation in return.

The trouble, from New Delhi’s perspective, is not any punitive action from Trump—though that is obviously damaging. The bigger problem is how frequently America’s demands and actions change these days. As one diplomat said to me, “Policy between states cannot change at the frequency of social media posts.”

India believes that it has consistently tried to provide America evidence of its intentions—while keeping its own core interests intact (like not damaging ties with Russia, a key energy supplier it has had to turn to again with the Hormuz closures despite tremendous prior pressure from the US to abandon Moscow). India has attempted to convey that it naturally leans towards America and Israel because Israel and the Gulf Arab states are now more consequential to Indian security and economic interests than an Iran that has been, for India, more a source of energy and transit ambition (the Chabahar port project) than a genuine strategic partner. New Delhi has since scaled back its Chabahar commitments after Washington declined to extend sanctions waivers—a decision that tells its own story about where India believes its future interests lie. And yet, it has been caught in Trump’s crossfire again and again.

This complicates any simple story of Indian “non-alignment” or “strategic autonomy” and introduces a clear element of geopolitical hedging.

The [February 2026 framework](#) that brought reciprocal tariffs down from 25 to 18%, and the interim trade agreement that followed, were sold in Washington as evidence of a relationship being repaired. But from New Delhi’s side, the reading has been more clinical: India absorbed a demand to end Russian oil purchases, committed to a staggering \$500 billion in American purchases over five years, and received in exchange a tariff rate still higher than what several of its competitor economies enjoy. When Secretary of State Marco Rubio [visited India](#) in May and, later, floated an [invitation](#) for Modi to visit the White House, Indian officials responded with “defensive diplomacy”—polite, correct, and conspicuously silent on the invitation itself. This is not the behavior of a government that considers the relationship settled or the trust rebuilt. It is the behavior of a government managing an indispensable but, at the present moment, unreliable partner.

The deeper lesson of the Iran war, for Indian foreign policy, is a reaffirmation of something India’s strategic community has long understood—India’s relationship with the United States has never been an alliance in the treaty sense, and Indian elites do not want it to become one. What India wants is access—to technology, to markets, to defense platforms, to a favorable balance of power vis-à-vis China—without the obligations of formal alignment that would compromise India’s freedom to manage its own neighborhood, its own energy security, and its own relationships with Russia, Iran, and the Gulf simultaneously. For a time it seemed, with the US proclaiming under Trump that it did not want dependents, that India’s position had finally been properly understood, but now the feeling is unsure.

The Iran war tested this model under real pressure, and it largely held. India tilted toward Washington’s coalition without joining it, absorbed economic costs without abandoning its options, and endured tariff coercion without capitulating on every point of American demand. What has changed is the mood in New Delhi’s foreign policy establishment—a hardening sense that the United States under the current administration treats partnership as a series of extractions rather than a reciprocal project, and that Indian goodwill, demonstrated through actions as costly as staying silent over the deaths of its own citizens, buys less accommodation in Washington than India may have imagined.

None of this suggests rupture. The structural logic that binds India and the United States—a shared, if asymmetric, cautiousness of Chinese power, deepening technology and defense cooperation, an Indian diaspora and economy still oriented significantly toward the American market—remains intact and will likely deepen further as the final bilateral trade agreement concludes. But it must be remembered that even on the diaspora front, the Trump position on visas and the Indian community in America has—for the first time in decades—made even the Indian diaspora [very worried](#) about their future in the US. So, the aftermath of the Iran war has stripped away the sentimental gloss that characterized much India-US commentary of the past decade. What remains is a more accurate and, in some ways, healthier picture—two powers whose interests overlap substantially but not completely, who need each other more than either likes to admit, and who will keep negotiating the terms of a partnership that neither is prepared to abandon, and neither is quite prepared to fully trust.

*The Pilot commentaries and responses represent the views of the respective authors. Alternative viewpoints are always welcomed and encouraged. Please write to [rob@pacforum.org](mailto:rob@pacforum.org) for more information on how to contribute.*



## REWIRING THE INDIAN OCEAN: WHY THE WORLD'S DATA IS TAKING NEW PATHS

BY SAMUEL BASHFIELD, GRACE CORCORAN, DR. V. SRIDHAR AND PROF. BALAJI PARTHASARATHY

**Samuel Bashfield** ([S.Bashfield@latrobe.edu.au](mailto:S.Bashfield@latrobe.edu.au)) is Research Fellow at the La Trobe Centre for Global Security. **Grace Corcoran** ([grace.corcoran@unimelb.edu.au](mailto:grace.corcoran@unimelb.edu.au)) is Research Fellow and the Senior Policy and Projects Manager in the Security and Geopolitics team at the Australia India Institute. **Dr. V. Sridhar** ([vsridhar@iiitb.ac.in](mailto:vsridhar@iiitb.ac.in)) is a Professor at the Centre for IT and Public Policy at the International Institute of Information Technology Bangalore, India. **Prof. Balaji Parthasarathy** ([pbalaji@iiitb.ac.in](mailto:pbalaji@iiitb.ac.in)) is Professor at the International Institute of Information Technology Bangalore, and a co-founder of the Institute's Centre for Information Technology and Public.

For more than a century, the submarine cables carrying the world's communications largely followed the same paths as ships. The first transoceanic telegraph lines hugged colonial trade routes and their fibre-optic successors did much the same. Sea lines of communication were mirrored, almost faithfully, by seabed ones. That era is ending. In the Indian Ocean—a seascape that not only connects littorals but funnels data between Europe, the Middle East, Asia, Africa and Australia—submarine cables are being laid in places ships rarely go. The contours of the [global internet](#) are being redrawn, and the Indian Ocean is where the redrawing is most visible.

Submarine cables matter because they carry almost all our digital communications. Roughly 99% of international internet traffic moves through them. When these digital conduits fail, critical services including banks, governments, hospitals and cloud networks feel it. Over 600 such cables are now operational worldwide, and the Indian Ocean hosts a growing share of the newest and most ambitious projects.

Four forces are driving the rewiring.

The first is route saturation as the traditional landing hubs are full. Singapore—long the digital pivot of Southeast Asia—now hosts 32 operational cables and [strictly regulates new data centres](#) because its electricity grid cannot keep up. Mumbai, which lands cables carrying 70% of India's international data traffic, faces similar pressure on a narrow stretch of beach. When too many cables converge in one place, a single dragged anchor or errant trawling gear can sever several at once. India's own telecom regulator has [acknowledged](#) that geographic concentration is now a national vulnerability. Diversification is no longer optional.

The second is choke point friction. The Indian Ocean has always been defined by its narrow entrances—Malacca, Hormuz, Bab el-Mandeb—and those bottlenecks now strain cables as much as ships. The Red Sea is the sharpest example. [Houthi attacks on shipping since late 2023](#) have damaged cables linking Europe and Asia, and repair vessels cannot safely enter Yemeni waters or secure permits from a fractured government. Repair times have ballooned. New cables are increasingly avoiding the Red Sea altogether, with planners exploring terrestrial routes through the Gulf states or even Arctic crossings. A choke point that once merely slowed trade is now reshaping the architecture of the internet itself.

The third is regulatory burden. Where states make cable work easy, cables go. Where they don't, cables go elsewhere. Indonesia's cabotage rules—which require Indonesian-flagged ships and crews for repairs in its waters—have produced [lengthy repair delays](#) on cables critical to regional connectivity. Several African states impose hefty permit fees that deter investment. By contrast, Oman has actively reformed its telecommunications regulation to court cable projects, and Australia operates a dedicated [Cable Connectivity and Resilience Centre](#) within its foreign affairs portfolio. The result is a sorting whereby predictable jurisdictions win the cables, complicated ones lose out.

The fourth, and perhaps most consequential, is the rise of the hyperscalers. Until about a decade ago, submarine cables were primarily laid by consortia of telecommunications companies—often national carriers—serving a broad mix of customers. That model is fading. Today, the heaviest builders of new capacity are American technology firms, including Google, Meta, Microsoft,

Amazon. Their motivation is not telecommunications in the traditional sense. It is the insatiable data demand of cloud computing and, increasingly, artificial intelligence, which requires ultra-fast links between data centre campuses on different continents.

*and encouraged. Please write to [rob@pacforum.org](mailto:rob@pacforum.org) for more information on how to contribute.*

SUBCO's Oman-Australia Cable supports a "[Great Southern Route](#)" between Europe and Asia that avoids both Malacca and the Red Sea. Google has announced a flurry of new projects—[Umoja](#), [Dhivaru](#), [Bosun](#), [TalayLink](#)—knitting Australia, the Maldives, Christmas Island, Kenya and Thailand into a new mesh. Meta's [Project Waterworth](#), announced alongside the US-India joint leaders' statement in February 2025, will be the world's longest cable system—50,000 kilometres connecting five continents, deliberately bypassing the Mediterranean, the Red Sea, the Malacca Strait and the South China Sea in a single sweep.

Taken together, these projects are creating a subsea "mesh" rather than the brittle, ship-following lines of the past. This dynamic creates a resilience gain. When one cable fails, traffic can be re-routed through others taking entirely different paths.

But the rewiring also carries two warnings.

The first concerns repair. Cables in remote stretches of the southern Indian Ocean can fall outside the traditional zone agreements that pool repair capacity. According to one industry report, [15% of planned new cables](#) will be laid beyond existing maintenance boundaries. A more dispersed network is more resilient against simultaneous damage – but slower to fix when damage occurs.

The second concerns dependency. The same American hyperscalers building the new routes often own them outright, rather than through consortia. As more of the Indian Ocean's data flows through cables owned by two or three American companies—answerable, arguably, to Washington—connected states are accumulating a new kind of strategic exposure. The risk is not sabotage, the usual focus of cable security debates. It is the quieter possibility of digital gatekeeping by a handful of private firms whose commercial decisions will shape who in the region gets fast, reliable connectivity, and on what terms.

The Indian Ocean's submarine cable map is no longer a faithful copy of its surface shipping lanes. It is being redrawn by route saturation, conflict, regulation and the demands of artificial intelligence. For the region's policymakers, the task is twofold: to make respective jurisdictions attractive enough to keep attracting new cables, and to think harder about what it means when digital seabed arteries are increasingly owned by foreign entities.

*This article draws on the findings of "[Rewiring the Indian Ocean: The Dynamic Geography of Submarine Cable Networks](#)" a research article recently published in the *Australian Journal of Maritime & Ocean Affairs*. These articles were written as part of a multi-year project being undertaken on submarine cable security by the Australia India Institute, with the support of a DFAT Australia-India Cyber and Critical Technology Partnership grant. All views expressed in this article are those of the authors only.*

*The Pilot commentaries and responses represent the views of the respective authors. Alternative viewpoints are always welcomed*



## **MEASURING TRUST VERSUS INFLUENCE IN INDIA-SOUTHEAST ASIA RELATIONS**

**BY SATU LIMAYE**

*Satu Limaye, PhD ([SatuLimaye@AmericaAsiaProject.org](mailto:SatuLimaye@AmericaAsiaProject.org)) is President & CEO of The America + Asia Project, Senior Fellow at the Center for Naval Analyses, and Visiting Scholar at George Washington University's Sigur Center.*

Having contributed to [monitoring India-Southeast Asia relations](#) via a descriptive analytical approach for Pacific Forum's journal *Comparative Connections*, I welcome the Institute of Southeast Asian Studies (ISEAS) 2026 [State of Southeast Asia Survey](#) and the Lowy Institute's 2025 [Southeast Asia Influence Index](#). Both present relevant metrics using different methodologies on Southeast Asia's relations with select external countries, including India. Another worthy tool is the Lee Kuan Yew School of Public Policy's [Anatomy of Choice Alignment Index \(AOCAI\)](#) but it only addresses Southeast Asian countries interactions with the US and China—not other external partners of ASEAN member countries.

However, a shared shortcoming, alas inherent in the design of such tools, is that neither provides sufficient consideration of India's own stakes and priorities in the region. By adding India's outlook and goals, a fuller, complementary assessment of India-Southeast Asia relations may be reached.

### **ISEAS 2026 State of Southeast Asia key findings about India**

A key finding of the 2026 ISEAS survey is that while India ranks last or fifth of the five countries measured for "trust" (Japan, EU, US, China, and India), for the first time trust exceeds distrust of India. And India's trust ranking is just below China's (with Beijing too moving into positive trust territory for the first time) and the United States. India's inclusion among the five countries polled about trust is itself notable given that the overall survey measures the influence (but not trust) of up to 11 external countries—depending upon the specific variable measured. For example, India ranks sixth among eight external countries for both economic and politico-strategic influence in ASEAN. However, the survey measures ASEAN's 11 Dialogue Partners' strategic influence separately—where India stands seventh. Trust versus influence is not easily separable or distinguishable partly given the shifting number of countries included in polling specific variables and

because the measures flowing into trust and influence are not the same.

A more challenging issue is that "trust" appears delinked from perceptions (not empirical measurements) of material economic and politico-strategic influence. For example, trust of India and other countries is measured by perceptions of whether India/they will "do the right thing" to contribute to global peace, security, prosperity, and governance; however, neither what is "right" or a country's interest and capability of doing "right" is clear). The two key components of trust in India are its role as a "responsible stakeholder that respects and champions international law" and its "vast economic resources and the political will to provide global leadership." Here again, the line between trust and influence is fuzzy—and perceptually not empirically measured. Distrust of India is primarily explained by two components; India's focus on "internal and subcontinental affairs and hence cannot focus on global concerns and issues" and India's lack of "capacity or political will for global leadership."

The complexity of the ISEAS survey's views of India is not mitigated by other highlights. India ranks last among all of ASEAN's dialogue partners for leadership in maintaining a rules-based order and upholding international law. Over 60% of ASEAN has "no confidence," "little confidence," or "no comment" that India will "do the right thing" to contribute to global peace, security, prosperity, and governance. And yet India ranks third of six choices as a "preferred and trusted strategic partner" to hedge against the uncertainties of US-China rivalry.

ASEAN elites seem conflicted about India's actual and potential role. Changing international conditions as much as assessments of India's actions appear to shape these perceptions. Depending upon one's half empty or half full approach to assessment, India is a poor option for ASEAN's stated priorities and requirements or ASEAN has a range of poor options among which India is a middle power option that cannot afford to be ignored.

### **Lowy Southeast Asia Influence Index (SEAI)**

According to the findings of the Lowy index, India ranks sixth in overall economic, defense, diplomatic, and cultural influence among ten extra-regional powers; behind China, the US, Japan, Australia, South Korea and ahead of UK, France, Russia, and Canada. Notably, India's overall "score" is proximate to other middle powers Japan, Australia, and Korea. India is surprisingly weak on cultural and people-to-people influence despite a long civilizational history

with the region. The reasons for India's relative status among external partners, according to the index is that India's "practical follow-through with Southeast Asian countries often lags behind the pace of announced initiatives and cooperative frameworks."

**On the table: India-Southeast Asia relations compared in the ISEAS Survey & Lowy Influence Index**

ISEAS and Lowy are aligned in seeing India's role as mostly commensurate with other middle powers—and on one or two

specific variables (say "trust" in the ISEAS survey or defense networks in the Lowy index) close to either the US or China. A distinction with a difference is that Southeast Asian opinions in the ISEAS survey appear lower than the measured empirical variables in the Lowy influence index.

A summary of India in the survey and index can be juxtaposed as follows:

| Select Variable/Measures                                                                    | India in ISEAS Survey                                                                                                                                                            | India in Lowy Influence Index                                                                                                      |
|---------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------|
| Economic Influence                                                                          | 6 <sup>th</sup> of 8 External Partners; significantly lower than China, US and Japan, and on par with Australia and Korea.                                                       | 6 <sup>th</sup> of 10 External Partners; significantly trailing China, US, and Japan and on par with Korea and Australia.          |
| Political & Strategic Influence                                                             | 6 <sup>th</sup> of 8 External Partners; significantly lower than China, US and Japan but comparable with other middle powers such as Australia and Korea.                        |                                                                                                                                    |
| Deepest Defence Networks                                                                    |                                                                                                                                                                                  | 4 <sup>th</sup> of 10 External Partners; behind US, Australia, and Japan and ahead of Korea, China, France, UK, Russia and Canada. |
| Strategic Relevance to ASEAN Among 11 Dialogue Partners                                     | 7 <sup>th</sup> of 11 ASEAN Dialogue partners and comparable to Australia, Korea, and UK.                                                                                        |                                                                                                                                    |
| Diplomatic Influence                                                                        |                                                                                                                                                                                  | 5 <sup>th</sup> of 10 external partners after China, Japan, Australia, and nearly equal to the US and marginally above Korea.      |
| Cultural Influence                                                                          |                                                                                                                                                                                  | 9 <sup>th</sup> of 10 External Partners and only ahead of Canada.                                                                  |
| Regional Engagement                                                                         |                                                                                                                                                                                  | 4 <sup>th</sup> of 10 behind China, Japan and Korea and ahead of Australia and the United States                                   |
| Leadership in Global Trade                                                                  | 6 <sup>th</sup> of 9 external partners and on par with Australia.                                                                                                                |                                                                                                                                    |
| Leadership in Maintaining Rules-Based Order and Upholding International Law                 | 9 <sup>th</sup> of 9 external partners and just below New Zealand and ROK.                                                                                                       |                                                                                                                                    |
| ASEAN's 3 <sup>rd</sup> Party Options for Hedging Against Uncertainties of US-China Rivalry | 3 <sup>rd</sup> of 6 choices (i.e., Australia, EU, India, Japan, ROK and UK) but significantly behind EU and Japan and just marginally behind Australia and ahead of UK and ROK. |                                                                                                                                    |

**Meaning from measurements**

What is the meaning of the ISEAS and Lowy measures of India-Southeast Asia relations? First, neither valuable initiative includes India's (or other external partners) desired weight and priorities in Southeast Asia. India reasonably could both perceive and measure its influence and role in Southeast Asia as commensurate and aligned with its interests—closer to its ranking and position in the Lowy Institute's Southeast Asia Influence Index than the perceptions of India in the ISEAS' Survey of the State of Southeast Asia.

For India, Southeast Asia is an important but not core priority compared to its immediate neighborhood, much of west Asia, and the major global powers and even Europe as measured by a range of variables including but not limited to domestic drivers of foreign policy, energy imports, exports of petroleum products, trade, foreign direct investment, maritime and land borders, chokepoints and se-lanes, foreign assistance, security threats, Humanitarian Assistance and Disaster Relief (HADR), and Noncombatant Evacuation Operation (NEO) activities and many other empirically measurable

factors. Southeast Asia is not unimportant to India but should not be over-weighted either. India's advances in Southeast Asia such as being a member of regional arrangements (including opting out of ones such as RCEP not perceived to be in India's interests) reflect diplomatic progress compared to its earlier isolation in the region. India also continues to act in Southeast Asia via the Quad; which bridges numerous interests. While still a middle-level economic and defense partner, the net slope of India's role in Southeast Asia has been steadily upward—albeit from a low base.

India now needs to update its assessment of Southeast Asia to determine whether the region should be accorded higher priority amidst great global disruptions. Southeast Asia needs to adjust its "demand-side" perceptions of India with less grand expectations and a deeper appreciation of what drives India and what it can, and cannot, deliver in Southeast Asia

*The Pilot commentaries and responses represent the views of the respective authors. Alternative viewpoints are always welcomed and encouraged. Please write to [rob@pacforum.org](mailto:rob@pacforum.org) for more information on how to contribute.*



## **INDIA-CHINA COMPETITION IN THE INDIAN OCEAN: STABILITY IS NOT RESET**

**BY SANA HASHMI**

*Sana Hashmi, PhD, ([sanahashmi2@gmail.com](mailto:sanahashmi2@gmail.com)) is a fellow at the Taiwan-Asia Exchange Foundation. She is an affiliated scholar with the Research Institute for Indo-Pacific Affairs. She has also served as a consultant with India's Ministry of External Affairs' Southern Division. Views are personal.*

There are multiple interpretations of where the India-China relationship stands today. Is there a thaw? Are the two sides gradually moving toward a reset? Or are ties still tense?

The reality lies somewhere in between. Since the Galwan Valley clashes in 2020, India has sought to manage ties with China, and there has been some momentum. The August 2025 meeting between Xi Jinping and Narendra Modi, along with some easing of restrictions on Chinese investment, [suggests](#) that both sides are now inclined toward preventing bilateral tensions from escalating further.

However, stabilization should not be confused with a reset. The fundamental sources of tension, including the boundary dispute, trade imbalance, security competition in South Asia, and broader strategic contest in the Indo-Pacific remain. The [disengagement](#) along parts of the border has reduced the immediate risk of another confrontation but has not resolved the underlying differences and strategic mistrust that has deepened since 2020. The developments of recent years have created a sense of normality, but not normalization. In this context, the current situation could only be described as fragile stabilization alongside continued strategic competition.

That competition, however, is not confined to the land border. The boundary dispute remains at the core of India-China tensions, but both countries have also strengthened their maritime capabilities and expanded their presence in the Indian Ocean Region (IOR), where their interests increasingly intersect. Maritime competition between

the two is not new, but its implications for [regional security and stability](#) are growing. This matters, particularly for India, because the IOR is part of its immediate neighborhood and a region in which it has longstanding interests. As China's military presence expands, India needs to consider not only how to respond, but what kind of role it wants to play in the Indian Ocean.

### **Maritime contestation in the IOR**

India's interests in the IOR span geography, economics, strategy, and civilizational connections. Its geographical position offers it a direct stake in the security and stability of the region, while its economic dependence on the Indian Ocean makes the security of maritime routes particularly important. A [large part](#) of India's trade and energy supplies pass through the maritime trade routes and sea lanes of communication of the Indian Ocean.

India's strategic interests in the region also translate into a greater maritime role. India has sought to establish itself as a [net security provider](#) in the IOR and expanded its naval engagement with countries across the region. Its role as a [first responder](#) has helped consolidate this image. India has strengthened its role through humanitarian assistance and disaster relief (HADR), naval exercises, capacity-building, and other forms of maritime cooperation. There is also a strong [civilizational dimension](#) to India's relationship with the Indian Ocean. India has had longstanding connections with countries across the region through trade, migration, religion, and cultural exchange.

China, though not an Indian Ocean littoral state, has rapidly [expanded](#) its economic, diplomatic, and naval presence in the region over the past decade. Its interests include energy security, trade, maritime routes, anti-piracy, and the protection of its growing overseas interests. The scale and nature of this expansion raise a broader question: Does China seek only to secure its interests in the IOR, or to shape the maritime regional order in its favor? Undoubtedly, China has clear economic and security interests in the region, but its activities suggest [ambitions](#) beyond securing trade routes, energy supplies, and overseas interests. Its growing military and dual-purpose presence give China greater capacity to sustain operations in the Indian Ocean and project power farther from its

shores. Gwadar Port, China's 99-year lease of Hambantota Port, and its first overseas military base in Djibouti illustrate that its economic and strategic presence increasingly intersect.

For India, the concern is that China's growing capabilities could allow it to translate its interests into sustained maritime power and influence. Over time, this could give China a greater role in determining the regional balance and potentially allow it to dominate parts of its maritime sphere. Its expanding military and dual-purpose presence in India's neighborhood consequently add a maritime dimension to an existing security challenge and has become an important part of India's assessment of the regional environment.

From China's perspective, India's position and capabilities are also central to its calculations in the IOR, allowing New Delhi to monitor and potentially constrain China's regional maritime activities. India's presence also forms part of the strategic environment that China must account for as it expands its Indian Ocean presence.

The competition extends beyond naval capabilities. Both India and China seek to build relationships with Indian Ocean states through political outreach, development, connectivity, maritime cooperation and security partnerships. India has given greater attention to the IOR, particularly under the Modi administration. Modi's consequential [visits](#) to Indian Ocean littoral states, including Maldives, Seychelles, and Mauritius over the past decade signal a more sustained political outreach to the region.

India has also supported regional mechanisms and dialogues, including the Indian Ocean Rim Association, the Indian Ocean Dialogue, and the Indian Ocean Conference. Initiatives such as [SAGAR](#), [Samudra Manthan](#), [Project Mausam](#), and the [Indo-Pacific Oceans Initiative](#) also point to India's effort to give greater strategic depth and coherence to this engagement. This has been accompanied by regular naval deployments and port visits across the region, making naval diplomacy an important part of India's engagement with Indian Ocean states.

China pursues its own regional outreach, establishing the China-Indian Ocean Region Forum in 2022 and expanding its [naval engagement](#), including port visits, exercises, maritime security cooperation, and HADR, among other forms of cooperation.

### **A more proactive Indian Ocean strategy**

India's response to China's growing presence cannot be to match China ship for ship. China has a much larger industrial base, much greater shipbuilding capacity, and substantially greater resources available for sustained naval expansion. India is unlikely to close this gap in the foreseeable future. The objective should instead be to build a maritime strategy suited to India's own geographic advantages and regional interests.

India has already begun to move in this direction. Attention to the IOR under the Modi government represents a departure from India's traditionally more [continental strategic focus](#). But India's outreach remains spread across a number of initiatives rather than a clearly defined long-term IOR strategy.

First, India needs to move from individual initiatives toward a more coherent and institutionalized IOR framework. Rather than treating maritime security, HADR, connectivity, capacity-building and development partnerships as separate strands of engagement, India should find a way for different tools to serve its broader regional objectives. A clearer coherent framework would also help provide greater continuity across governments and institutions.

Second, India should use this coherent framework to build on the partnerships it has already established. Modi's outreach to countries in the region has already created the much-needed political momentum, while India already has a range of development, connectivity, HADR, capacity-building and maritime security initiatives across the region. The priority now should be to make sure of the implementation of the initiative and that these engagements more reliable, sustained and predictable.

This means following through on existing commitments, strengthening institutional mechanisms with partner countries and ensuring that India's engagement responds to their priorities. India does not need to match every Chinese initiative, and it cannot, but it needs to focus on building a reputation as a consistent and dependable long-term partner.

Third, India needs to strengthen the security component of its regional engagement. India's broader developmental engagement in the Indian Ocean is an advantage, but it needs to be complemented by a stronger security-oriented presence if India is to fulfil its ambition of becoming a net security provider. This could involve expanding logistical support agreements, coastal surveillance, information sharing, and joint operations. India should also make greater use of partnerships with countries that share an interest in a stable and open Indian Ocean. France is particularly important in this regard, given its territorial presence and military capabilities in the region. Closer cooperation with France, as well as other partners, can expand India's maritime reach and capabilities without requiring India to replicate China's scale of naval deployment.

Finally, India needs to be more confident in articulating what kind of regional role it wants to play. India does not need to choose between being a security provider and a development partner. It needs to strengthen the mechanisms and partnerships it already has rather than continually creating new initiatives. Its geographical position, naval capabilities, development partnerships, and longstanding relationships with Indian Ocean states give it a strong foundation on which to build. China's growing military presence in the IOR is likely to remain a feature of the regional security environment and will continue to pose a direct challenge to India.

India's response should not be limited to reacting to Chinese moves. Instead, Beijing's growing presence should push New Delhi to sharpen and strengthen an Indian Ocean strategy that builds on its existing interests, partnerships, initiatives, and capabilities. India's greatest advantage is also its most obvious one: It is a resident Indian Ocean power with the geographic position and maritime capabilities to shape the regional order and safeguard stability.

*The Pilot commentaries and responses represent the views of the respective authors. Alternative viewpoints are always welcomed and encouraged. Please write to [rob@pacforum.org](mailto:rob@pacforum.org) for more information on how to contribute.*



## ***THE SOUTH ASIAN BALANCE OF POWER AFTER STUDENT REVOLUTIONS***

**BY AMBASSADOR (RET.) JAMES MORIARTY**

***Ambassador (ret.) James Moriarty***

*([james.moriarty@pacforum.org](mailto:james.moriarty@pacforum.org)) is Senior Advisor at Pacific Forum. During a 36-year career as a U.S. diplomat, Ambassador Moriarty served as Special Assistant to the U.S. President for the Indo-Pacific region, U.S. Ambassador in Nepal and later in Bangladesh, and lived and worked five years in China and five years in Taiwan. Since retiring, he served for seven years as Chairman of the American Institute in Taiwan.*

For years, China has been quietly trying to expand its influence in South Asia. Then, in 2024 and 2025, student-led demonstrations—first in Bangladesh and then in Nepal—upended politics in both countries, leading to elections that brought in new power arrangements. In Nepal, three parties for the most part friendly towards China had traded power since 2015. They found themselves replaced by a student-led political party with a rapper-turned-mayor of Kathmandu as prime minister. In Bangladesh, the new leader was the son of the most bitter enemy of the pro-Indian former PM—to whom India provided asylum after she fled Bangladesh in disgrace. China, meanwhile, continued to make ever-bigger inroads in South Asia through investment, development assistance, and arms sales. One important question raised by these shifting alignments is whether a recent agreement with Bangladesh will give China, including its military, a foothold in the Bay of Bengal and the Indian Ocean. Collectively, these developments underscore the need for the United States to stay involved and work to ensure US interests are not ignored while currents shift in South Asia.

### **Nepal and Bangladesh follow similar paths**

The student-led movements in Bangladesh and Nepal followed similar paths. In both cases, students were frustrated with poor economic prospects, self-serving political classes that clung to power, and ever-increasing corruption. In both cases, the military refused to fire on student demonstrators and instead brought in

student leaders to discuss the path forward to genuine democracy. (In both cases, this could well have been because many senior officers knew students who were participating in the demonstrations.)

### **An unmentioned rivalry**

Since independence in 1947, India has assumed that it is the dominant power in South Asia and should be treated with deference by the smaller countries in the region. China, for its part, considers the smaller countries of South Asia to be inside the Chinese sphere of influence. To top things off, China and India have a long, disputed border. They fought a border war in 1962, and as recently as 2020 clashed bloodily again, high in the Himalayas. Perhaps because of that experience, while China has worked hard to expand its influence in South Asia, both New Delhi and Beijing have appeared somewhat cautious about antagonizing the other.

### **New Bangladesh prime minister charts a new course**

Bangladesh Prime Minister Tarique Rahman visited China from June 22-26, on his first overseas tour since taking office in February 2026. (Traditionally newly elected prime ministers of Bangladesh had made their first foreign visits to India.) Rahman's visit resulted in 15 memorandums of understanding covering diplomacy, trade, investment, connectivity, and strategic cooperation. China pledged approximately \$300 million in grant assistance to Bangladesh, and the two countries agreed to explore a 2+2 dialogue involving their foreign and defense ministries. The proposed 2+2 dialogue would establish a regular institutional mechanism for Bangladesh and China to discuss diplomatic and security issues. Bangladesh and China also discussed modernization of Chattogram and Mongla ports and a proposed [China-Myanmar-Bangladesh Economic Corridor](#).

What emerged from the visit was a significant broadening of Bangladesh-China relations beyond their traditional economic focus. The 2+2 mechanism would not amount to a military alliance, but it would make defense and strategic cooperation more structured and consistent than the two countries' current *ad hoc* engagement. (For over 50 years, China has been the largest supplier of weapons

to the Bangladesh military.) At the strategic level, the [joint communiqué](#) between the two countries stated, “Both sides agreed to elevate their comprehensive strategic cooperative partnership to jointly build a China-Bangladesh community with a shared future in the new era.” Chinese Premier Xi Jinping reaffirmed his country’s long-term commitment to the relationship, stating that “no matter how the world changes, China will not waver in its commitment to the overall direction of China-Bangladesh friendly relations and will always be a good friend, good neighbor and good partner of Bangladesh.”

In contrast, Bangladesh recently postponed a proposed August trip to New Delhi by Prime Minister Rahman because of an interview given there by exiled former Prime Minister Sheikh Hasina.

### **New government in Nepal moves cautiously**

In contrast to Tarique Rehman’s foreign policy activism, Nepali Prime Minister Balen Shah has emphasized that his priorities focus on a sweeping, 100-point, reform agenda centered on anti-corruption, administrative speed, and strategic neutrality. He has described Nepal as a bridge between China and India and stressed that Kathmandu aims to foster open dialogue with both neighbors simultaneously, prioritizing mutual economic benefits while protecting Nepal’s independent national interests.

### **It’s the economy**

While some in Nepal’s older generation of leaders had ideological affinity for China, for the most part in both Bangladesh and Nepal, the recent attraction of China has been based on economic factors. Both Bangladesh and Nepal desperately need infrastructure development and early on signed on to China’s Belt and Road Initiative (BRI). Despite some problems with both corruption and follow-through, the BRI had completed some impressive projects in Bangladesh. In contrast, in Nepal, which joined the BRI in 2017, no projects have been completed, in part because Nepal has pushed for grants from China rather than loans to finance the proposed 20 major BRI projects. That said, though, China has become the leading source of foreign direct investment in Nepal. Bangladesh, meanwhile, has become the world’s second-largest exporter of ready-made garments (RMG)—after China. China has become Bangladesh’s largest trade partner, largely because of trade of inputs within the RMG industry. And with production costs in China increasing, more and more Chinese RMG-related companies are investing in Bangladesh.

### **What does this all mean?**

To some degree, China’s increasing influence in South Asia is understandable: The world’s second-largest economy would naturally be looking at increasing trade and investment opportunities in nearby countries, particularly ones with complementary economies. In comparison, India’s influence in the region has decreased. A striking example of that shift would be the agreement that Prime Minister Rahman signed in Beijing to provide to China land near Mongla Port, Bangladesh’s second-largest port, for construction of an exclusive economic zone. Located in southwestern Bangladesh, near the Indian border, Mongla provides access through the Bay of Bengal to the Indian Ocean. Previously the land now destined for China’s use had been reserved for an

Indian special economic zone (SEZ). Indian analysts now worry that Chinese dual-use construction in the SEZ will allow monitoring and surveillance of Indian army and navy movements in a strategically sensitive area and support for Chinese military movements.

Looking ahead, Nepal will likely have fairly stable ties with its two giant neighbors. China’s primary goal there is a secure China-Nepal border, which is in Nepal’s own interest. Ties of history, culture, and religion between Nepal and India and the presence of some 4 million Nepali workers in India make dramatic developments in Nepal-India relations unlikely. (Remittances make up more than a quarter of Nepal’s GDP.)

Bangladesh is different. Former Prime Minister Sheikh Hasina had extremely close ties with India. New Delhi provided her unwavering support even as her government became more authoritarian, more corrupt, and more brutal, setting the stage for the student uprising and her flight to India. Since then, a Bangladesh tribunal has convicted her in absentia for crimes against humanity related to the deaths of some 1,400 people during her government’s attempts to suppress the student protests. For as long as she is allowed to stay in India, it is unlikely that India’s relations with Bangladesh will improve dramatically.

China’s advances in Bangladesh, for which the United States remains the single largest export market, underscore the need for the United States to stay actively involved in South Asia, which serves as the hinge between the Pacific and Indian Oceans. The United States can protect its interests by continuing to build productive, mutually beneficial relationships throughout the region and, when necessary, raising legitimate security and other concerns with all countries in the region. Both Nepal and Bangladesh have traditionally welcomed the United States playing such a role. They both view the United States as the only friendly, external power with the clout to help them navigate successfully their relationships with two, much larger neighbors.

*The Pilot commentaries and responses represent the views of the respective authors. Alternative viewpoints are always welcomed and encouraged. Please write to [rob@pacforum.org](mailto:rob@pacforum.org) for more information on how to contribute.*