

Assessing the Indo-U.S. Bilateral Ties from Strategic Partnership to Transactional Engagement: Reemergence of the Pakistan Factor (2017–2026)

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Abstract:

This article explores the evolving trajectory of U.S.-India relations under the Trump and Biden administrations. It aims to assess the structural shift in the U.S.-India relationship from an institutionalized strategic partnership toward an interest-driven, transactional framework. It examines how the “Pakistan factor” has continuously shaped bilateral cooperation and analyzes the key developments that contributed to the re-emergence of Pakistan in the United States’ South Asia policy approach, particularly during Trump’s second term. Additionally, the study investigates how renewed Washington-Islamabad, deal-based engagements have influenced India’s regional strategic calculations. The research answers two core questions: How have U.S.-India relations shifted from an institutional strategic partnership to a more transactional engagement? How have renewed diplomatic relations between the U.S. and Pakistan affected the Washington-New Delhi nexus? Anchored in Neorealism, Offensive Realism, and Defensive Realism, the study examines how an anarchic international system compels states to prioritize national interest and ensure sovereign survival. This research is qualitative and relies on secondary data. The findings suggest that India’s perception of its strategic standing vis-à-vis the U.S. has been profoundly affected by Pakistan’s renewed relevance in regional diplomacy and U.S. strategic calculations.

Keywords: United States, India, Pakistan, strategic patience, tariffs, transactional diplomacy, multilateral coalitions, institutional frameworks, geopolitical hedging

INTRODUCTION

A decade-long bilateral partnership between the United States and India has experienced alternating periods of heightened strategic alignment and persistent trade and economic frictions. During President Donald Trump’s first tenure (2017-2021), the relationship was marked by significant strategic convergence in key areas, including defense, intelligence sharing, security cooperation, and the broader Indo-Pacific architecture. Concurrently, deep disagreements over trade and market access persisted, driven largely by Trump’s unilateralism and “America First” foreign policy paradigm (Joshi, 2021). Following the transition of power, President Joe Biden maintained strong security and defense ties with New Delhi, even amidst ongoing trade tensions.

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China remained the primary catalyst driving Washington and New Delhi closer together. Scholarly assessments reveal that throughout both the Trump and Biden administrations, India consistently balanced its engagements with the United States, China, and Russia to preserve its long-standing strategic autonomy (Gul & Akhtar, 2025). Extensive literature provides a comprehensive matrix of the evolving U.S.-India areas of convergence and divergence shaping modern U.S.-India bilateral relations. The existing scholarship purely treats Pakistan as a passive actor and evaluates it through a localized and historical counterterrorism lens. Very few studies systematically analyze the “Pakistan factor” as a continuous and dynamic variable shaping modern Indo-U.S. bilateral ties.

Upon returning to the White House in January 2025, President Trump re-emphasized his interest-driven transactional diplomacy approach as the primary paradigm while simultaneously intensifying security cooperation with India. A historic 10-years defense pact was finalized in late 2025; however, it was accompanied by heightened trade frictions, including a 50% baseline tariff and a 25% punitive tariff penalizing India for its continued procurement of discounted Russian crude oil (Mollan, 2025). Simultaneously, the U.S. approach toward Pakistan shifted away from the noticeable distancing that marked the Biden administration. (Kashif, 2025). Under Trump 2.0, however, Washington’s policy of “strategic patience” with Islamabad has ended, replaced by a highly pragmatic, deal-based and business-like approach (Jaffer, 2026).

LITERATURE REVIEW

The existing literature on U.S.-India relations consistently emphasizes a trajectory of deepening strategic convergence, primarily driven by mutual structural anxieties about China’s rise in the Indo-Pacific. Scholarship frequently notes the clash between Trump’s transactional foreign policy approach and India’s commitment to strategic autonomy, alongside baseline resilience of bilateral partnership despite chronic economic frictions. Historically, much of the literature discusses Pakistan through the lens of growing U.S.-India relations, noting how this alignment increases strategic pressure on Islamabad, alters the regional balance of power, and complicates Pakistan’s parallel relations with China and the U.S. Studies such as “US-India Ties During the Trump Years and Beyond: Continuity and Convergences,” illustrates how Washington and New Delhi successfully transformed their historically estranged relations into closer strategic partnership in the post-Cold war era. This line of research emphasizes that the relationship remained durable because the U.S increasingly viewed India separately from Pakistan, tolerating tensions over trade and New Delhi’s purchase of the Russian S-400 missile defense system (Joshi, 2021).

Similarly, “US-India Bilateral relations during the Trump and Biden Administrations: The China Factor” offers a comparative analysis of the two presidencies. The study claimed that both administrations shared the common objective of countering Chinese influence but followed different operational methodologies. Trump favored a more deal-based, highly transactional and bilateral framework, whereas Biden prioritized institutionalized, values-based multilateral frameworks and coalition within the Indo-Pacific (Gul & Akhtar, 2025). In “India-US Convergence and Divergence under the Trump Administration,” Verma (2025) argues that the first Trump administration substantially strengthened bilateral ties through enhanced political, defense, strategic and diplomatic cooperation. It also highlights China’s growing regional assertiveness in the Indo-Pacific as a mutual concern that cemented their “Comprehensive Global Strategic Partnership.”

Furthermore, scholarship like “Strategic Realignment and Transactional Diplomacy: A Critical Analysis of Indo-US Relations During the Trump Administration” establishes that strategic continuity in defense and anti-China policies persisted despite tensions over trade tariffs. Mahmud (2025) examines the landmark 2023 Modi- Biden Summit, emphasizing that the state visit underscored an expanding defense technology, clean energy, and global governance cooperation between the world’s two largest democracies.

Viewed collectively, contemporary literature offers a comprehensive matrix of the evolving U.S.-India areas of convergence and divergence shaping modern U.S.-India bilateral relations. The scholarship extensively covers regional security dynamics, India’s balancing acts, and the broader implications for South Asian stability. However, a significant gap remains: very few studies systematically analyze the “Pakistan factor” as an active, continuous, and dynamic variable shaping contemporary Indo-U.S. bilateral ties. This study addresses that academic gap by assessing how Pakistan once again received renewed significance in Washington’s strategic calculus under the second Trump administration.

RESEARCH METHODOLOGY

This study utilizes qualitative, descriptive, and explanatory research frameworks in order to provide a comprehensive perspective on friction and collaboration during the decade-long partnership between the US and India. The study derives its information from secondary sources, such as government statements, joint ministerial statements, articles, and verifiable international policy reports. The methodology offers a solid structure to achieve two main goals of the study. The first is the descriptive part of the study and this focuses on the restructuring of formal relations between the U.S. and India from a formal, structured strategic partnership to a relationship based on the interests of both parties. The second is the explanatory part of the study, which focuses on the re-emergence of Pakistan and the U.S. policy changes during the Trump 2.0 administration with respect to the U.S.-India relations.

THEORETICAL FRAMEWORK

This study is primarily grounded in Neorealism to investigate the shifting patterns of South Asian alignments. To capture the complex security dynamics between 2027 and 2026, It integrates elements of offensive and defensive realism, drawing on the foundational theories of Kenneth Waltz, John. J. Mearsheimer, Stephen Walt, and Charles Glaser.

Neorealism posits that international System is structurally anarchic, lacking a centralized global authority above sovereign states. In this self-help environment, states act as rational actors that prioritize their own national interests, security, and survival. This explains India’s behaviour: New Delhi keeps protecting its strategic autonomy by engaging with the U.S. while simultaneously importing discounted crude oil from Russia. It similarly explains Pakistan maneuvers to reposition itself diplomatically and economically, as well as the U.S. imposition of coercive tariffs policies to achieve some important strategic interests from India. Offensive realism, meanwhile, argues that states can never ever fully trust each other’s future intentions, making security competition, power maximization, and regional rivalry inevitable. This framework illustrates U.S. policy, as Washington actively expands its regional influence and security through mechanisms like the Quadrilateral Security Dialogue (Quad) and Indo-Pacific Economic Framework for Prosperity (IPEF) to directly

compete with and counter China's expanding regional footprint. Conversely, Defensive realism suggests that when one state increases its military power for but other states consider it as an offensive move, prompting counter-balance behaviours. To counter the perceived long-term challenge from China, both India and the United States have systematically maximized their defensive capabilities by expanding defense pacts, military interoperability, and formalizing institutional cooperation within the Quad.

U.S.-INDIA RELATIONS UNDER TRUMP AND BIDEN ADMINISTRATIONS (2017-2026)

The First Trump Administration (2017-2021)

The bilateral ties between India and the United States entered a complex, highly volatile phase during Donald J Trump's first tenure in the White House. The period was structurally bifurcated: while they boosted defense and military cooperation, deep-seated trade disputes, immigration restrictions, and clashing domestic political discourses significantly ties (Shamim, 2025).

The "America First" Policy

Guided by the "America First" doctrine, the Trump administration adopted a starkly transactional approach toward India. This paradigm prioritized immediate U.S domestic economic and nationalist interests, introducing severe frictions into trade negotiations and traditional diplomatic protocols. While strong personal chemistry between President Trump and Prime Minister Modi helped expand high-level strategic cooperation, the broader relations was characterized by tensions emerged due to deal- based and short- term interests.

Indo-Pacific Strategy

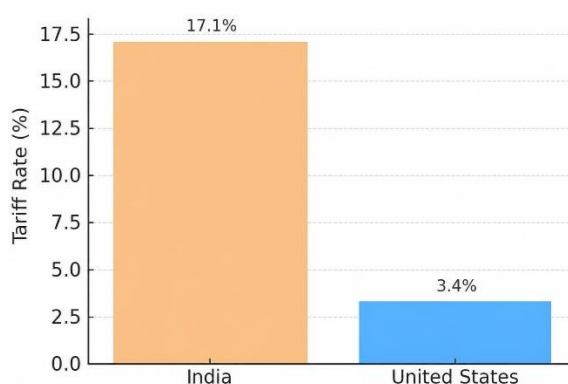
A major point of convergence occurred within the U.S. National Security Strategy (NSS) 2017, which explicitly described India as a "key partner" in maintaining a free and open Indo-Pacific. The language used in that strategy was warmly received by New Delhi (Anand, & Aparajita, 2025). Washington and New Delhi closely coordinated policies to promote a peaceful, inclusive, and prosperous regional order. The U.S. routinely praised India's developmental and humanitarian assistance initiatives in the Indian Ocean region, formally recognizing New Delhi's role as a regional net security provider. Further, during Trump's state visit to India in February 2020, both nations decided to upgrading maritime domain awareness by strengthening Quadrilateral consultations, the U.S-India-Japan trilateral summits, and the institutionalized 2+2 Ministerial Dialogue featuring their respective Foreign and Defense Ministers ("Joint Statement," 2020).

QUAD Revival

On the sidelines of the 31th ASEAN Summit in Manila in November 2017, the United States, Japan, India and Australia officially revived Quadrilateral Security Dialogue (Quad), which had remained dormant for nearly a decade. The resurrected alliance focused on preserving rules-based order and a free and open Indo-Pacific. The growing was progressively elevated from a senior official-level dialogue to a ministerial-level mechanism by November 2019. During their inaugural ministerial meeting in New York, the foreign ministers expanded their agenda to include counterterrorism, maritime security, cybersecurity, development finance, and humanitarian assistance/disaster relief. Over Trump's four-year term, the alliance solidified through seven rounds of senior official-level dialogue talks and two rounds of ministerial-level dialogues (Wei, 2022).

Trade Disputes

Economic relations faced sever disruptions in 2018 when the Trump administration imposed 25% tariffs on steel and 10% tariffs on aluminum imports from major trading partners, including India (Hammond et. al., 2025). Frictions intensified when U.S Trade Representative Robert Lighthizer formally removed India from the Generalized System of Preferences (GSP) program for developing nations, asserting that New Delhi had failed to comply with the statutory eligibility criteria (“United States will,” 2019). According to data from the Council on Foreign Relations, India retaliated in 2019 by slapping duties on various U.S agricultural exports, including almonds, walnuts, cashews, apples, chickpeas, wheat, and peas. Notably, U.S. apples and in shell-walnuts faced 20% retaliatory tariffs, while Chickpeas were hit with a 10% duty (Aryes, 2020). Intense negotiations occurred throughout 2019 and 2020 to secure a limited deal, but no final deal was concluded due to major differences over market access and protectionist policies (Anand, & Aparajita, 2025).



Source: International Journal of Creative Research Thoughts (IJCRT)

As illustrated in Graph 1, during the year 2018, the average U.S tariff rate of 3.4% was vastly lower than that of the average 17.1% tariffs rate of India.

Defense Agreements

In a sharp contrast to the economic frictions, defense cooperation expanded significantly during Trump’s first term. At the inaugural ceremony of U.S.-India Ministerial 2+2 Dialogue, both nations reaffirmed their commitment to deep security ties, and the U.S. subsequently designated India a “Major Defense Partner” to facilitate the advanced military. According to the U.S Department of State, a major institutional breakthrough occurred in 2018 with the signing of the Communications Compatibility and Security Agreement (COMCASA). This foundational pact helped India to utilize U.S.- origin military communication platforms, strengthening operational coordination. Bilateral frameworks like the Defense Technology and Trade Initiative (DTTI) were leveraged to promote the co-production and co-development of defense systems, while parallel negotiations began on the Industrial Security Annex (ISA) to promote military-to- military cooperation (“Joint statement on,” 2018). By 2020, defense integration culminated in the signing five major agreements during the annual 2+2 Ministerial dialogue. The most critical of these was the Basic Exchange and Cooperation Agreement (BECA). BECA provided India with real-time access to aimed to highly classified U.S. geospatial intelligence, satellite data, and critical information significantly improving the accuracy, navigation, and precision targeting of Indian stand-off weapons system (Hali, 2020). These

foundational agreements successfully institutionalized strategic trust and close defense coordination between the armed forces.

The Biden Administration (2021-2025)

Under the presidency of Joseph R. Biden, U.S.-India ties witnessed a significant shift, moving away from traditional bilateral transactions toward a more institutionalized “Comprehensive Global Strategic Partnership” (Kadian, & Kumar, 2025).

Vision and Strategic Continuity Toward India

The Biden administration maintained the baseline strategic path of its predecessor, confirming India’s indispensable role within the broader U.S. Indo-Pacific strategy. Washington continued to view New Delhi as a critical geopolitical counterweight to an increasingly aggressive and assertive China. U.S. Secretary of State Antony Blinken characterized the U.S.-India ties as a “bipartisan success story”, prioritizing the strengthening of Indo-Pacific cooperation (Saalman, 2021). However, unlike Trump’s transactional model, the Biden administration heavily favoured multilateral coalitions and institutional frameworks to solidify the partnership (Gul, & Akhter, 2025). This approach generated deeper defense integration, expanded intelligence-sharing networks, and high-frequency naval exercises across Asian waters (Threlkeld et. al., 2021).

Multilateral Cooperation and Institutional Frameworks

Multilateral groupings and institutional frameworks emerged as the operational core of Biden’s India policy, aimed at stabilizing the Indo-Pacific and securing global supply chains against external shocks. A key milestone occurred in 2021 when the Biden administration elevated the Quadrilateral Security dialogue (QUAD) from a ministerial working group to a formal leader-level summit. By the end of his term, the heads of state had met six times across four separate Leader’s Summits, elevating the Quad into a central pillar of regional security and strategic coordination (“The United States’ enduring,” n.d.). The annual 2+2 Ministerial Dialogue was maintained to align diplomatic positions and defense strategies, with Washington hosting fourth dialogue in April 2022 (U.S. Department of State, 2022).

Beyond the Indo-Pacific, the administration co-created the I2U2 mini-lateral grouping in October 2021, comprising India, Israel, the UAE, and the United States to spearhead joint infrastructure investments and technological initiatives across water, energy, space, health, transportation, food security, and technology (“I2U2 group,” n.d.). In May 2022, India joined the U.S.-led Indo-Pacific Economic Framework for Prosperity (IPEF) alongside 13 other regional economies (United States, Australia, Brunei Darussalam, Fiji, India, Indonesia, Japan, Republic of Korea, Malaysia, New Zealand, Philippines, Singapore, Thailand, and Viet Nam) to build fair, resilient, and sustainable trade standards (“Indo-Pacific Economic,” n.d.). Furthermore, during the September 2023 G20 Summit in New Delhi, the United States and India jointly launched the India-Middle East-Europe Economic Connectivity Corridor (IMEC) under the umbrella of the Partnership for Global Infrastructure and Investment (PGI) to establish transformative economic corridors linking South Asia to European markets (Chaurasia, 2023).

Overall, the expansion of the Quad, IPEF, and IMEC under the Biden administration confirms Defensive Realism. The heightened security dilemma of a more powerful China spurred the U.S. and

India to formalize these security agreements. This gave the U.S. and India the option to pool their resources and threat to keep the region stable and secure, and avoid provocation with a reaction.

Technology and Defense Partnership

Advanced technology and defense co-production served as the primary drivers of bilateral relations during the Biden years. In June 2023, GE Aerospace inked a historic Memorandum of Understanding (MoU) with India's state-owned Hindustan Aeronautics Limited (HAL) to jointly manufacture F414 fighter jet engines within India. This agreement facilitated the expansion of the domestic assembly of 99 engines destined for the Indian Air Force's LCA Mk2 fighter program ("GE Aerospace signs MOU," 2023). In October 2024, the Indian Ministry of Defense finalized a Rs 34,500 crore procurement deal with General Atomics to acquire 31 MQ-9B high-altitude, long-endurance (HALE) Predator drones (comprising 15 Sky Guardians and 16 Sea Guardians) to boost India's long-term indigenous defense manufacturing goals (Singh, 2024).

To build a sustainable defense innovation bridge, the U.S. Department of Defense and the Indian Ministry of Defense launched the India-U.S. Defense Acceleration Ecosystem (INDUS-X) in June 2023 ("India-U.S. defense acceleration," 2024). This track was complemented by the 2022 inauguration of the Initiative on Critical and Emerging Technologies (iCET), designed to foster cooperation in semiconductors, artificial intelligence, and quantum computing ("US-India TRUST," n.d.). To accelerate commercial technology supply chains, in June 2023, the U.S. and India inked an MoU on Semiconductor Supply Chain and Innovation Partnership. Under this framework, Micron Technology, Inc. committed to invest an \$ 825 million to build an advanced semiconductor assembly and testing facility, supported by co-funding from the Indian government ("PM Modi's state," 2023).

China Factor

Managing the systematic challenge of China's rise remained the central strategic anchor of the Biden-Modi alignment. Both countries deepened the operational coordination, utilizing the IPEF and Quad to systematically degrade Chinese economic and military leverage (Gul, & Akhter, 2025). Under the Biden, the U.S. gradually shifted its earlier strategic focus on counter-terrorism campaigns toward a strategy of "extreme competition" against Beijing, formally identifying India as the indispensable strategic "lynchpin" partner to counterbalance China (Li, 2025). This operational alignment was tested during 2022 India-China border clashes. The U.S. military provided unprecedented, real-time tactical intelligence, and actionable satellite imagery support to Indian armed forces, enabling India to successfully anticipate and to counter the incursions by the People's Liberation Army (PLA). This successful intelligence sharing served as a "test case" of successful cooperation and between the militaries of the two countries (Shinkman, 2023). It was further reinforced by the high frequency, complex naval exercises aimed at ensuring maritime security across the Indian Ocean (Mohan, 2024).

Democratic Values Narrative

The Biden administration consistently framed the U.S.-India partnership through a normative narrative, defining it as a vital bond between the world's oldest and largest democracies. Speaking at the 48th US-India Business Council's India Ideas Summit, Secretary of State Antony Blinken

labelled the Washington-New Delhi connection a “defining relationship” for the Twenty-first century (“India-US defining relationship,” 2023). Joint statements, including the June 22, 2023 communique issued during Prime Minister Narendra Modi’s state visit, highlighted a shared commitment to freedom, democracy, universal human rights, the rule of law and equal opportunities for all citizens. Shared values of India emphasized promoting an open, accessible, and secure technology ecosystem through mutual confidence and trust. It aimed to embolden the shared values and democratic institutions (“Joint statement by,” 2023). This narrative allowed the Biden administration to effectively balance U.S strategic interests with India throughout his tenure.

Trump’s Second Term and Strained India-U.S. Ties (2025- Present)

Following Donald Trump’s return to the presidency in January 2025, the democratic, values-based rhetoric of the Biden era was dismantled and replaced by a strictly interest-based, transactional foreign policy model (Solanki, 2026).

Trade and Tariffs: The "Transactional" Friction

Economic relations were deteriorated sharply at the start of April 2025 when the Trump administration announced 26% tariffs on Indian exports, which was quickly adjusted to 25 percent (Haq, 2025). Tensions escalated later that month when the U.S imposed comprehensive 50% tariff on majority of Indian goods, adding 25% punitive duties specifically targeting India’s continued import of discounted Russian oil (“Trump India tariffs,” 2025). Trump’s implementation of a 50% tariff wall and Russian oil tariffs from India exemplifies Neorealism’s Self-Help Principle. The administration’s zero-sum game theory subjected the administration’s aggressive interstate exchanges to domestic self-preservation and self-sustainment. This policy resulted in India being a direct competitor and not a crucial partner in the international spectrum. Indian Ministry of External affairs reacted sharply, labelling the punitive economic measures “unfair, unjustified, and unreasonable”, and officially stating that New Delhi will take all the necessary measures to protect and preserve its national interests (“India criticises U.S.” 2025). Consequently, India retaliated by imposing a 37% tariff on U.S. agricultural goods and 100% duty on specific American automotive imports.

India’s self-imposed tariffs and consistent buying of Russian oil at discounted market rates illustrates Neorealism’s Strategic Autonomy. In a self-help world where external security providers are unreliable, New Delhi was able to avoid reliance on a single superpower. This domestic defensive response to a great-power coercion preserved India’s security autonomy and discouraged reliance. In February 2025, negotiations over a possible mutually beneficial and multi-sector Bilateral Trade Agreement (BTA) took place but delayed due to Trump’s high tariffs on Indian imports (Solanki, 2026). However, after a year, a framework for an Interim Agreement was finalized by the two sides. Under this deal, the U.S. lifted 25% Russian oil penalty and lowered additional tariff from 25% to 18 percent. In return, India committed to systematically removing specific tariff and non-tariff barriers on U.S imports, executing massive purchase of U.S. commercial goods worth \$500 billion (“Fact sheet,” 2026).

According to the USA Facts April 2026 report, during the FY-2025, the U.S. imports from India stood at \$152 billion against \$89.2 billion in exports, resulting in a trade deficit of \$ 63.1 billion that continues to fuel Trump’s transactional grievances (“What is the value,” 2026). Amidst the outbreak

of the U.S-Israel war with Iran in February 2026, U.S extended a temporary 30-day sanctions waiver on Russian crude to countries facing oil shortages, including India; however, the administration used this waiver tactics, are largely as leverage to extract deeper concessions in ongoing trade talks (“US waiver set,” 2026).

Timeline of U.S. Tariffs on India during Trump 2.0		
Date	Event	Tariff Announcement
April 02 (2025)	(Reciprocal tariff announced)	(Initial 26% but later 25%.)
April 05 (2025)	(Tariff on all imports)	(A 10% implemented)
April 09 (2025)	(Delay in tariff)	(16% for India until ninety-days)
July 08 (2025)	(Increase in delay period)	(Until August 1, 2025)
July 30 (2025)	(Penalty tariff for procuring Russian crude oil)	(25% tariff)
August 01 (2025)	(25% initial tariff correction)	(10% for all imports and 15% reciprocal)
August 07 (2025)	(25% tariff implementation executive order)	(White House announcement of tariff on Indian goods with some exception)
August 27 (2025)	(25% additional tariff announced)	(Total tariff became 50%)
October 05 (2025)	(Tariff relaxation announced)	(Total tariff become 18%, reduced significantly from earlier 50% duties)
February 2, 2026	(Announcement of trade deal)	(India lifted tariff and started purchasing U.S. goods)
February 24 (2026)	(Announcement of initial CVD)	(125.87% duty rate)

Source: ClearTax, updated on Feb 26th, 2026

Security and Regional Stability

Despite the intense trade wars, In October 2025, the U.S. Defense Secretary Pete Hegseth and Indian Defense Minister Rajnath Singh India inked a historic 10- year defense pact. Defense pact was designed to expand defense cooperation, joint maritime coordination, technology transfers, and classified information sharing (Mollan, 2025). Shortly thereafter, India’s Defense Acquisition Council authorized the procurement of six new U.S.-made P-81 maritime patrol and anti-submarine warfare aircraft to strengthen surveillance and anti-submarines operations across the Indian Ocean (“India approves purchase,” 2026).

During a high-profile visit to New Delhi, the Commander of the US Indo-Pacific Command reaffirmed Washington’s operational commitment to Indian Ocean security through a newly formed economic connectivity and commerce vehicle named the Indian Ocean Strategic Venture (Solanki, 2026). However, strategic trust faced a major setback during the may-2025 conflict between Pakistan and India. President Donald J Trump took to Truth Social to claim that he had personally brokered a “full and immediate ceasefire” between Islamabad and New Delhi (Chance, 2025).

Indian Foreign Secretary Vikram Misri strongly rejected Trump’s narrative, clarifying that the truce was the result of bilateral communications between Pakistan and India without third-party-mediation (“India again denies,” 2025). The bilateral confidence faced a noticeable breach because of this public disagreement. Furthermore, New Delhi has expressed deep concern regarding a potential U.S-China rapprochement ahead of Trump’s visit to Beijing in May 2026, fearing it could strengthen China’s military posture along the disputed border in Arunachal Pradesh. Nonetheless, India remains an indispensable partner in countering the Chinese assertiveness along the Line of Actual Control (LAC) in tandem with Quad forces (Pieal, 2026). To successfully navigate this fluid environment, India has leveraged its strategic autonomy to operate effectively within a multipolar world order (Ashraf, 2026). Significantly, the conspicuous omission of India and the Quad from the 2026 U.S. National Defense Strategy reflects Washington’s shift toward a less formalized approach to Asian collective security (Raman, 2026).

Technological Cooperation and Innovation

To integrate critical technologies and innovative tools, the two powers built new bilateral operational structures. In February 2025, they launched the Transforming the Relationship Utilizing Strategic Technology (TRUST) initiative to co-develop AI tools and secure semiconductor supply chains (Mittal, 2026). Simultaneously, the Catalyzing Opportunities for Military Partnership, Accelerated Commerce and Technology (COMPACT) initiative was operationalized to enforce a results-driven agenda for defense technology and trade integration (Bishoyi, 2025). At the India AI Impact Summit, the two nations signed a joint statement on the “India-U.S. AI Opportunity” to accelerate pro-innovation regulatory policies, enhance the physical hardware stacks.

In February 2026, following a long period of strains between New Delhi and Washington over the purchase of discounted Russian oil, New Delhi formally joined U.S.-led Pax Silica initiative. The critical technology alliance was designed to build secure supply chains for advanced manufacturing and semiconductors while also decoupling from Chinese-dominated manufacturing hubs (Roy, 2026). the semiconductor cooperation frictions due to strict U.S. export control rules, a perceived lack of immediate economic returns for both countries, and U.S. concerns regarding India that it could become a strategic risk similar to China (Mittal, 2026).

Immigration and People-to People Ties

In order to avoid a wider trade war, the Modi government demonstrated unprecedented flexibility on the issue of undocumented immigration. Following a phone conversation between Modi and Trump, India agreed to repatriate 18,000 illegal nationals. According to a January 2025 report by a Canadian Broadcasting Corporation (CBC), an estimated 725,000 undocumented Indians lived in the U.S. (Shivji, 2025). Concurrently, the Trump administration introduced restrictive rules to the H-1B visa program, including an unprecedented \$100,00 processing fee for new applicants. Because India tech workers historically receive over 70% H-1B visas, the updates have significantly created uncertainty into the tech corridor, forcing major Indian IT companies to rely on L-1 and O-1 visas or remote work arrangements (Ajmera, 2025).

Pakistan’s Renewed Relevance

Over the past decade, Pakistan-U.S. relations have been marked by shifts, fluctuating from counterterrorism cooperation to deep diplomatic isolation, before arriving at their current status of renewed strategic relevance. The downward spiral was accelerated on January 1, 2018, when President Trump published a tweet criticizing the historic delivery of \$33 billion in U.S. aid to Pakistan over 15 years. Trump claimed that Washington had received nothing in return but “lies and deceit” (Donald J. Trump, 2018). U.S. administration promptly suspending \$1.3 billion security assistance to Pakistan. However, by late 2018, the Trump administration concluded that an honourable military victory in Afghanistan was impossible without Islamabad’s diplomatic assistance, given its structural leverage over the Taliban leadership. Trump formally requested the assistance of Pakistani Prime Minister Imran Khan, a move that positioned Islamabad as a central mediator in the Doha peace talks. This facilitation culminated in the February 2020 U.S.-Taliban peace talks, paving the way for the ultimate U.S. military withdrawal from Afghanistan in 2021.

During the Biden administration, relations entered a state of low-level equilibrium, marked by systematic disengagement from the White House. Following the end of the Afghan war, Pakistan's strategic importance to Washington reduced (Afzal, 2025). Biden made the history as the first U.S. President never to place a single phone call to a sitting Pakistani prime minister during a two-year period, completely neglecting Islamabad from his public addresses regarding Afghanistan. Even during the catastrophic summer 2022 floods in Pakistan, Biden abstained from direct communication and later referred to Pakistan as "maybe one of the most dangerous nations in the world". Relations deteriorated further when Prime Minister Imran Khan blamed Washington of plotting a "regime change" conspiracy against his government (Afzal, 2023). Additionally, Biden administration officials expressed sever concerns over intelligence indicating that Islamabad was secretly working to develop a long-range intercontinental ballistic missile (ICBM) capable of striking the Washington mainland (RAND, 2025). This isolation ended sharply when President Trump returned to office in January 2025, enabling Pakistan to rapidly re-establish high-level diplomatic access to the U.S. Moving past the historical and narrow "War on Terror" framework, the Modern Washington-Islamabad axis is driven by the pragmatic principles of "Resource Realism" and "Geopolitical Hedging" (Jaffer, 2026).

Key Events Leading to the U.S. Rapprochement with Islamabad

Consequent to the transition in U.S. leadership in 2025, Washington's re-engagement with Pakistan has introduced new frictions between India-U.S. bilateral partnership, fundamentally reshaping the contemporary Washington-New Delhi strategic axis.

The May 2025 Border Crises and Ceasefire Mediation

A dangerous four-day military conflict erupted between India and Pakistan from May 7-10, 2025, initiated by Indian cross-border strikes. The escalation represented the most serious and potentially disastrous military crisis in recent regional history, with both sides claiming tactical victory (Clary, 2025). President Donald J Trump intervened directly, announcing on Truth Social that the United States had successfully brokered a "full and immediate ceasefire" (Kleiderman, 2025). While Indian Foreign Secretary Vikram Misri rejected the narrative of third-party mediation, insisting the truce was purely the result of bilateral discussions, the episode represented that Washington no longer give New Delhi free hand in regional escalations ("India again denies," 2025). The divergence over the mediation significantly eroded confidence between the U.S. and India during the second half of 2025 (Martyn, & Gupta, 2026). Pakistani Prime Minister Shehbaz Sharif made a formal nomination of President Donald for the Nobel Peace Prize for his successful mediation efforts in the recent India-Pakistan border crisis ("PM defends Trump's Nobel," 2025).

Munir's White House Visits and Institutional Re-hyphenation

On September 25, 2025, President Trump hosted Pakistani Prime Minister Shehbaz Sharif and Field Marshal Asim Munir at the White House. During the high-profile encounter, Trump publicly praised Field Marshal Munir, signaling a formal warming of bilateral ties. This institutional embrace was a new symbol of a more balanced regional policy, one that consciously rejected New Delhi's claims to exclusive "strategic status" in Washington's thinking ("Sharif calls for," 2025). Following the historic White House meeting, Prime Minister Sharif addressed the General Debate at the 80th session of the United Nations General Assembly. Concurrently, both nations signed a new trade agreement

that established a normalized 19% tariff framework on U.S. imports from Pakistan, signaling a stabilization of economic ties ("Pak PM Sharif," 2025). Reports from Bloomberg indicated that Trump's strong personal rapport with Pakistani officials, particularly with the powerful Army Chief Field Marshal Asim Munir deeply unsettled worried Indian officials by granting Islamabad a distinct diplomatic edge in Washington (Palepu & Chakraborty, 2026). Overall, Trump 2.0's Islamabad approach represents a combination of Offensive Realism and Resource Realism. The strategy reflects a more active approach to global relations as Islamabad, with its unique position, provides the US with a tactical advantage to cover several active military fronts with limited resources, while Trump 2.0 preferred flexible and temporary alignments.

Pakistan's Mediation Role in the U.S.-Israel War Against Iran

On February 28, 2026, a devastating military conflict erupted as the United States and Israel launched joint operations (Operation Epic Fury/ Operation Roaring Line) targeting Iranian military and civilian infrastructure. In response, Iran launched retaliatory strikes against Israeli territory and U.S. forward operating military bases throughout the Gulf region ("Trump backs Pakistan," 2026). Capitalizing on its unique diplomatic position, Pakistan successfully hosted the high-level "Islamabad Talks" from April 11-12, 2026. This diplomatic intervention aimed to bring the hostile nations to the negotiating table, immediately halt active hostilities, and lay down a framework for long-term regional peace and stability ("Pakistan's statement on," 2026).

Overall, Pakistan's role as a mediator in the April 2026 Islamabad talks in securing a temporary ceasefire, is a textbook case study of Geopolitical Hedging. Islamabad's clever use of the geographic position to break its diplomatic isolation and secure key economic and strategic resources from the US, enhances its structural survival without forcing it to a hard choice between competing global blocs. Despite Islamabad taking on the heavy responsibility of ending the destructive war, New Delhi rapidly politicized the peace initiative. Indian officials aggressively dismissed Pakistan's diplomatic role in the U.S.-Iran negotiations, labelling the push a "self goal" and publicly asserting that Islamabad lacked the structural credibility to act as an international mediator ("India calls Pakistan's US-Iran," 2026). The primary reason for New Delhi's frustration was that they had been left out of the peace process. Despite India's immense economic weight and regional stakes, it remained absent from the negotiations, whereas Islamabad positioned itself as a proactive, indispensable diplomatic mediator in the U.S.-Iran talks (Daniele, 2026). Despite vocal Indian objections, President Trump maintained his confidence in Islamabad's diplomatic utility, publicly praising Prime Minister Sharif and Field Marshal Munir for their vital assistance in negotiating a fragile ceasefire ("Trump backs Pakistan," 2026).

Neorealist Hypotheses and Analytical Propositions

Hypothesis 1- Systematic Balancing/ Defensive Realism: If a rising hegemon (the China factor) is altering regional power distributions, status-quo states (the U.S. and India) will defensively blind to each other to counter their collective security dilemma.

Hypothesis 2- Self-Help and Interest-Based Cooperation / Neorealism: If a great power is threatened by the existential security of its domestic economy or its position relative to the other powers, it will emphasize short-term transactional resource maximization, even at the expense of its long-standing institutional ties.

Hypothesis 3- Issue-Based Realignment/ Offensive Realism: If a superpower has severe strategic limitations in its secondary military theatres (the U.S. in the U.S.-Iran war), it will break regional inflexibilities and be willing to make pragmatic, temporary, ideologically-based alignments with states (the Pakistan factor) that are situationally useful.

Hypothesis 4- Relative Gains Strategy/ Neorealism: If a secondary power (Pakistan) is rewarded with a sudden elevation of diplomatic relations by a global superpower, its regional rival (India) will perceive that development as a structural zero-sum threat and will take active measures to negate that development in order to safeguard its position.

Categorization, Verification Matrix, and Empirical Mapping of Key Events (2017–2026)

Following table differentiates the confirmed developments, policy announcements, projections, and analytical expectations as the study extends its administrative line into 2026.

Category	Description	Verification Status	Examples from Text
Confirmed Development	Events verified through direct observation or widely accepted public records.	High (Documented Facts)	2023 Modi-Biden Summit, Signing of BECA (2020), COMCASA (2018), Revival of Quad (2017).
Policy Announcement	Statements of intent from recognized officials.	High (Verifiable Intent)	Joint Ministerial 2+2 Statement (2020), ICET Initiative (2017) designation USA designation as a "Key Partner".
Projection	Future events or data derived from logical extrapolation of existing trends or statistical models.	Medium (Based on Current Trends)	Increase in total U.S. commercial goods purchases by India (projected value from trade talks) models.
Policy Decision/Outcome	Specific analytical propositions tested by reported events.	Analytical Proposition	Renewed Washington-Islamabad deal-based engagements calculations, Strategically with Islamabad ended.
Conjecture/Event (Speculative/Diplomatic)	Reported future-expected date based on public claims or unique claims, non-sanctioned events).	Low (Verification Challenged or Absent)	Trump's Truth Social post personal rapport with Pakistani officials granting Islamabad a diplomatic edge.
Geopolitical Shift (Long-term)	Major structural changes in regional influence and security alliances.	High (Historical Precedent)	Evolution of India as a "Net Security Provider" (2017 NSS to present), systematic institutionalization of Quad as central pillar (leader-level 2021).
Trade Conflict/Retaliation (Outcome)	Imposition of tariffs and counter-tariffs leading to economic data points.	Medium (Documented Data/Reports)	India removed from GSP (2019), retaliatory duties on U.S. agricultural exports (CFR, 2019), average U.S. tariff 3.4% vs India 17.1% (2018 UCRF graph).
Technological Initiative (Cooperation)	Formal programs aimed at specific sectors and co-development.	High (Policy Statements/Reports)	Launch of TRUST initiative, COMPACT initiative, Joint Statement on "India-U.S. AI Opportunity" (2026 Ministry of External Affairs).
Strategic Hypothesis/Proposition (Neorealist)	Specific analytical propositions tested by reported events.	Analytical Proposition (Non-Literal Verification)	Hypothesis 1 (Defensive Realism), Hypothesis 2 (Self-Help), Hypothesis 3 (Offensive Realism), Hypothesis 4 (Relative Gains Strategy).
Institutional Reform/Expansion	Formal changes in organizational structure and scope.	High (Documented Official Documents)	Elevation of Quad to Leader-level (2021, 6 Leader's Summits by end of term), launching of INDUS-X and ICET, formation of Pax Silica.
Immigration and People-to-People Ties	Specific policy implementation and reported demographic data.	High (Documented Data)	India agreed to repatriate 18,000 illegal nationals (following telefon conversation), restrictive H-1B visa rules with processing fee (Aimera, 2025), estimates of 725,000 undocumented Indians (CBC, 2025).
Geopolitical Hedging (Pakistan Factor)	Analysis of diplomatic maneuvers to maintain autonomy and gain resources.	Analytical Proposition (Non-Literal Verification)	Pakistan's use of geographic position to broker diplomatic isolation, 'Doha peace talks' and mediation role in the U.S.-Taliban peace talks.
Future Scenarios/Contingency Plans	Hypothetical long-term possibilities and planned responses.	Medium (Strategic Analysis)	New Delhi's concern regarding potential U.S. China rapprochement (before May 2026 Trump visit to Beijing), risk of a wider trade war avoided by immigration flexibility.

The Conceptual Model

This model highlights how The China Factor acts as the primary structural drive influencing the U.S. foreign policy and bilateral partnerships in South Asia.



Recommendations for Pakistan

For Pakistan to realize its renewed strategic significance and safeguard its national security, some policy steps are required;

Institutionalized Geopolitical Hedging: Pakistan must continue its contemporary trajectory of diplomatic hedging and issue-based alignment, deliberately avoiding an exclusive or restrictive partnership with any single global superpower. Islamabad must preserve its foundational economic ties with China through the China-Pakistan Economic Corridor (CPEC) while selectively engaging with Western partners to ensure financial stability, access international capital markets, and maintain global institutional integration.

Leverage Transit Networks for Resource Realism: Islamabad should aggressively prioritize regional connectivity as a strategic necessity, transforming its unique geography into tangible geopolitical leverage. Building upon the mid-2025 Uzbekistan-Afghanistan-Pakistan (UAP) Railway framework agreement, Pakistan must operationalize transit and energy networks linking South Asia and the Middle East, converting connectivity into an active instrument of both economic survival and strategic foreign policy.

Expand Specialized Defense Synergies: Pakistan should build robust defence synergies with key regional allies by establishing joint military training academies with Turkey and Azerbaijan. These partnerships must focus heavily on non-escalatory, modern domains such as cybersecurity and counterterrorism. Conducting regular, high-frequency joint exercises will build operational interoperability and project collective strength without triggering an arms race.

Implement Proactive Risk Management: For Islamabad to face the imminent threats of an unstable region and show a sense of trustworthiness, it needs to conduct formal security audits on an annual basis with Pakistan's core Muslim allies. The audits should be conducted in a systematic manner and allow for tracking asymmetric threats faced by the Indian border in general. The data derived from these audits must directly inform Pakistan's contingency planning and diplomatic strategies, ensuring that the state remains resilient and capable of preventing sudden military escalations.

CONCLUSION

The development of U.S.-India relations from 2017 to 2026 presents an instructive endorsement of structural realism in a new multipolar and complex geopolitical landscape. While turning to the first question, it addresses the shift from an institutionalized strategic partnership to a transactional engagement was short and sharp, depending on the different approaches of the two different U.S. administration. The Biden administration's bilateral architecture was characterized by a textbook case study of defensive realism, in which core deep-multilateral alliances like the Quad, Indo-Pacific Economic Framework for Prosperity (IPEF), and the India-Middle East-Europe Economic Corridor (IMEC) emerged to manage the security dilemma that China's assertiveness had created. In contrast, the second Trump administration sharply transitioned the bilateral relationship towards an aggressively transactional framework defined by self-help neorealism. By building a 50% tariff wall on Indian goods and implementing punitive tariff on New Delhi for buying cheap Russian oil, Washington was showing the world that a transactional superpower believes that earning the most from its own resources is more important than establishing a long-term partnership. Following this, India's protection of its own markets and maintenance of its strategic autonomy shows that mid-sized states will protect their interests when faced with the

economic coercion of a large power. For the second research question concerning the regional consequences from the renewal of U.S.-Pakistan relations, the U.S. engaging with Pakistan caught New Delhi off guard as they expected the U.S. foreign policy would remain indefinitely de-hyphenated. The Trump administration utilized Pakistan's unique geographic situation through resource pragmatism and realism. Islamabad successfully became an essential regional mediator after the April 2026 "Islamabad Talks", where they attempted to establish a tenuous ceasefire during the U.S.-Iran military conflict that became increasingly volatile. The diplomatic re-hyphenation caused even further disruption to India's strategy, as New Delhi sought to delegitimize the peace process with vocal denouncement and were completely kept out of high-level negotiations, therefore, diminishing the U.S.-India axis to a great extent.

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