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The Partner System Repriced

Agency, Structure, and the US-India Rupture of 2025-26

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This paper analyses the 2025--26 rupture in US-India relations

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Contents

1 Executive Summary

This paper proposes that the 2025–26 rupture in US-India relations arose from two key factors that enmeshed: presidential decision-making based on dogmatic foreign policy beliefs and transactional style in place of strategy; and the silent but long accumulating frustration in the United States with India over trade, immigration and defence capabilities. The latter created a fertile setting for the former to take root and flourish when executive interest and protection dissipated with the change in presidency. India's own assumptions of the relationship were also consequential in what followed.

The paper is based on 42 interviews conducted in the United States, and online, between December 2025 and March 2026, with current and former officials, congressional staff and policy specialists across the political spectrum.

India's calculation when President Trump assumed office was understandable but eventually proved to be costly. Delhi assumed that the goodwill built with the first Trump administration, especially between the leadership, would carry forward into the second. It believed, logically, that institutional ties built over two decades would be maintained regardless of the President's personal disposition. Delhi, therefore, placed less emphasis than it might have on direct, personal access to Trump and his circle, at a juncture when the need and value of such access was escalating sharply. And in trade and defence procurement, India had given successive American administrations strong cause for frustration well before this crisis, a grouse that a more erratic and biased president was always going to exploit rather than resolve. None of these realities excuses what followed. But it meant that the usual buffers and safeguards in the American system were less effective than Delhi assumed.

The paper also reveals a broader shift in how America treats its partners, ominously, one that will outlast this president. Washington is now less willing to bear political or economic costs to sustain a relationship unless the partner offers something tangible in return and not mere congruence in values and ideals. This reciprocity may be in terms of operational value, or a domestic constituency in America that would make abandoning the partner costly. India remains important to American strategy against China, but lacks that form and degree of domestic backing. The result is a paradox: India matters strategically, but is politically dispensable, because no actor inside the American system pays a significant price for India's sidelining.

Strategically Essential, Politically Disposable: The Pentagon treats India as necessary to regional stability but the White House treats it as replaceable on trade, migration and politics. No domestic constituency pays for the rupture.

This shift becomes apparent through a clear empirical sequence. First, a White House claiming credit for a ceasefire mediation that was denied by India; immediately followed by nothing less than a presidential outreach to Pakistan's military head, General Asim Munir, tied to dubious commercial interests. Next, punitive tariffs applied on India for the same trade arrangement that China pursued at far greater scale without penalty. Further, parallel warnings given to India, delivered personally in New Delhi, by high officials of the State and War departments within months of each other. These admonishments struck at the very heart of Indian autonomy and conveyed where India stood in the larger scheme of new American thought. And finally, an August 2026 Senate vote formalised the tariff double standard into law with overwhelming bipartisan backing.

The crisis also showed that the checks India assumed would restrain the American president are delayed, ineffective and dismissed by the executive, just when needed. Congress moved slowly. The courts eventually corrected the unlawful use of executive power, but only after the damage was done. Decision-making inside the American government grew more personalised around one man and less accountable to normal process. For any foreign partner, the real danger lies in that gap, the interval between an executive overreach and its eventual, often belated, correction.

Pakistan read this particular president better than India did, and moved faster to exploit the conditions, despite having a weaker hand. It combined an aggressive lobbying effort during the crisis with personal access built through military and commercial channels. Unrestrained by democratic ethos or ethical norms, it displayed a readiness to hand the President the kind of wins he valued personally, before asking anything in return. India relied instead on the strength of institutional relationships and shared democratic values built over twenty years. This was a reasonable approach with any ordinary administration, but one that underestimated how much this particular president rewarded direct, personal access over the durability of formal ties.

None of this means India should disengage from the United States. It means India must hedge more deliberately: a more diversified set of partners, greater indigenous capability, real counter-leverage, and a permanent, professional presence in Washington are needed regardless of how American politics develops from here. Strategic autonomy remains a useful form of insurance, but insurance comes at a cost, in this case, a lower priority in American planning. The relationship can recover but the assumptions that once governed it are less valid. India must now prepare for an America seemingly willing to endorse a leadership that elevates transactions over values, profit over ideals, and rhetoric over truth.

2 Introduction: The Rupture Reconsidered

The United States under President Trump has repriced its partnerships, lowering the worth it assigns to them and the political cost it will pay to sustain them. India offers a clear case. While the repricing was initiated by presidential agency, the subsequent behaviour of American institutions suggests it will persist beyond this presidency. For this analysis, 'agency' refers to the capacity and actions of individual leaders, particularly the President, who can introduce or alter policy based on personal judgement. In contrast, 'structure' denotes the enduring institutions, rules, and incentives—such as bureaucratic procedures, statutes, and the balance of power among the branches—that shape, constrain, and sustain policy across administrations. This distinction provides the basis for this paper's analytical framework.

In June 2025, weeks after Indian and Pakistani forces exchanged strikes across the international border, the President of the United States invited Pakistan's army chief to lunch at the White House.

> **Agency vs Structure** : The central analytical framework of this paper rests upon the distinction between agency and structure. While presidential agency governs the initiation of a policy rupture, it is the underlying institutional structure that dictates the longevity of its effects. For example, the executive reversal of a specific tariff may alter the immediate instrument of policy, yet it leaves the more fundamental strategic repricing entirely intact.

No member of the civilian government of Pakistan was present, making this an unprecedented reception for a serving Pakistani general. For the preceding month, the President had been claiming credit for the ceasefire, though Delhi repeatedly rejected his assertion of having mediated the deal. By August, American tariffs on Indian goods had risen to 50%, the highest applied on any partner excepting the trade confrontation with China.[1] In September, a proclamation imposed a fee of $100,000 to the visa category through which Indian engineers staff American technology firms.[2] Within four months, 20 years of steady diplomatic progress had suffered their worst setback. Over the year that followed, the Pentagon began developing a doctrine under which partner independence would itself be treated as a liability.

> Delhi interpreted the sequence as betrayal and Washington as long-delayed reciprocity. However, both of these interpretations are incomplete.

This paper uses the 2025 rupture to investigate how presidential authority and institutional structure interact when American partnerships are turbulent, and what the Indian case reveals about a shift in terms affecting the whole partner network. Over the same period, Canada, Denmark, Japan and South Korea, all bound to Washington by treaty, were treated more harshly than India. The comparative analysis with treaty allies shows that while India's experience was severe, longstanding allies within Washington's formal security system confronted even sharper penalties. This exposed both the breadth and the underlying logic of the repricing. These findings situate India's case as part of a wider pattern reshaping America's approach to its partners and alliances, and not merely an outlier.

Presidential agency governs the initiation of policy; institutional structure decides how long it lasts. A revaluation was already underway. Presidential impulse determined the timing, the style and the manner of the rupture, while structure set its direction and its duration. The tariff rate shows the difference. It rose on a single presidential signature, and fell to 18% six months later on the same authority.

Far from a conclusion, that reversal serves as the analytical baseline. Four features of the American position survived that reversal, and none of them originated with this president. They form the paper's core findings, developed across the remaining sections. In trade, American policy now rests on a protectionist floor that both parties accept, applied to partners according to their capacity to retaliate. In migration, American politics have turned against the Indian professional and students. The visa measures of September 2025 and July 2026, and the proposal now under discussion to price Optional Practical Training itself, a rule sent to the White House for review in August 2026, are its clearest expression. In crisis management, Washington's first instinct in the subcontinent is to stop the fighting, which favours whichever party engages earliest, as Rawalpindi did in May. And in defence policy, the doctrine now emerging from the Pentagon welcomes greater capability in partners while remaining suspicious of their independence. None of this began with this President, and none of it will end with him. The American system did check his methods, but late, partially, and through the courts rather than the elected Congress. This monograph advances two related arguments:

First, the rupture in 2025-26 can only be understood by examining the tension between presidential agency (that is, the executive's ability to introduce and alter policy based on personal judgement) and institutional incentives (the enduring arrangements, whether electoral, statutory or doctrinal, which continue from one administration to another).

Second, the wider repricing, that is, the lowering of the political cost that Washington will bear to maintain its network of treaty allies and non-treaty partners, goes beyond the scope of any one administration and is a result of fundamental changes in American politics and strategy.

The study is based on 42 interviews conducted between December 2025 and March 2026, principally in Washington, including congressional staff, former officials of both parties and think-tank scholars. A substantial proportion of these individuals spoke on background. Approaches to Indian officials were unsuccessful. The paper is accordingly an account of American decision-making rather than a bilateral study. The Indian side is presented through the documentary record and through what American interlocutors observed of it.

Washington's own experts admit that real-time insight into this administration's decisions is unusually scarce; one senior scholar described outside analysis of it as trafficking in second-hand rumour.[3] Interview evidence is therefore verified through examining documentation: filings under the Foreign Agents Registration Act, the 2025 National Security Strategy and

A Washington-Centric Study: This is a study of American decision making rather than a bilateral history. The evidence is interviews, official documents, laws and lobbying records. Indian access was limited.

National Defense Strategy, the Pentagon's China assessment, congressional legislation, and the author's own contemporaneous commentary. The record closes in mid-August 2026.

The paper proceeds in five analytical stages. Section II examines the expectations each capital carried into 2025 and the grievances accumulating beneath them. Section III examines the decision system that produced the rupture, including the Pakistani dimension. Section IV evaluates whether American institutional safeguards live up to their reputation. Section V assembles the documentary record of a repricing that extends beyond this presidency, and states the objections the fieldwork itself raises. Sections VI and VII highlight the implications for both capitals and identify three trajectories for Indian planners. What follows is an analysis of how the modern American state functions, including why its famed institutional safeguards proved so ineffective. India planned for a reliable partner, but this paper outlines the new realities that New Delhi must now navigate.

3 The Partnership Before the Break: Misaligned Expectations

The India-US partnership that broke down in 2025 had been built carefully across four American administrations, both Republican and Democrat, and its foundations were substantial. The defence agreements of 2016 to 2020 gave the two militaries common logistics, secure communications and shared geospatial data, while bilateral defence trade grew from a negligible base to exceed \$20 billion.[4] The Quad was raised to a leaders' level summit in 2021. The 2023 initiative on critical and emerging technologies extended into jet engine co-production and semiconductor supply chains,[5] domains Washington has historically reserved for its closest treaty allies.

The foundations were not only military. In the two decades after the civil nuclear agreement, Washington built counter-terrorism cooperation with Delhi following the Mumbai attacks of 2008, pressed at the United Nations for the listing of the Pakistan-based leaders India named, supported Indian entry to the export control regimes, and designated India a Major Defense Partner in 2016.[6] Much of that framework had been constructed at Indian request and against Pakistani resistance.[7]

That architecture of agreements, initiatives and working relationships depended on continuous attention from the top, and the Biden administration gave it. Lindsey Ford, who directed policy on the Indian subcontinent at the Pentagon, stressed to the author how deliberately senior officials invested in the relationship. A senior official responsible for Indo-Pacific policy in that administration said the top tier was uniformly and strongly pro-India: The President, Deputy Secretary of State Kurt Campbell, and Secretary of Defense Lloyd Austin all sought to

The Foundations Were Deep: The break was serious and the foundation of the relationship was substantive.. Twenty years of cooperation in diplomacy, security, technology and intelligence elevated India to a tier Washington maintained for close allies.

keep India aligned, and exhorted their bureaucracies to deliver on the relationship. The same official noted that substantial progress was achieved across defence and technology, even as the process generated continuous frustration.

3.1 The Record Beneath

Beneath these committed principals, a large number of complaints were building up. The official outlined an interagency procedure that followed three different lines of approach. The trade agencies viewed India as a notorious protectionist that showed no intention of changing. The State Department had generally remained supportive but had become increasingly concerned about human rights and religious tolerance. And the Pentagon considered India to be essential for balancing China.

The Partnership Needed Maintenance: The relationship looked institutional and ran on political will. Progress came when leaders overrode objections from below. Once that cover left with the presidency, the buried problems surfaced.

On defence cooperation, the official described India's posture as extractive rather than even transactional. A genuine transaction involves reciprocity; India sought advanced technology to build its own industrial base while offering little operational cooperation in return. Modest initiatives were routinely stalled by the Ministry of External Affairs, whose primacy over the Ministry of Defence puzzled a Pentagon accustomed to the reverse arrangement. Ford, cited above, offered a more generous reading of the same years, recalling that Indian counterparts eventually arrived with fresh ideas and an appetite to lean forward, a divergence in the record between two officials dealing with India.

Joshua White, a former White House official on the Indian subcontinent now at Johns Hopkins University, distinguished older American scepticism from newer. The older linkages went back to the civil nuclear agreement and were by then familiar: non-proliferation experts had thought the original bargain too generous, trade officials had their own complaints, and others tracked India's voting record at the United Nations. Sharper views joined them during the Biden administration. There was growing concern over domestic illiberalism and among officials whose work was the transatlantic relationship, frustration at India's stance on Russia after 2022. Most notably, there was quiet alarm over India's alleged targeted assassinations abroad. Defence planners raised a more basic question: how useful a partner India would be in twenty years if it were still struggling to secure its own borders.[8] The older criticisms had long been priced in; the newer ones eroded support among the partnership's own defenders.

The assumption was set out in Delhi's own published thinking. Writing in 2020, S. Jaishankar observed that India had solidified ties with successive American administrations by finding, with each, a commonality that resonated, and that India must maintain "a narrative in the US of its value", one "customized for the President of the day".[9]

Three Americas, Three Indias: American policy toward India was never one policy. Trade saw protectionism, State saw politics and rights, the Pentagon saw China. The rupture came when nobody at the top held them together.

A Washington scholar of Indian security read this as a presumption that India could extract concessions indefinitely, because

Washington's strategic need for Delhi would always outweigh India's obligation to reciprocate.[10] A South Asia analyst at a Washington research institution added a criticism of American statecraft, noting that the Biden administration had been excessively lenient, persuading itself that Delhi was fundamentally aligned and merely managing domestic sensitivities.[11] Between Indian presumption and American indulgence, a formal demand for reciprocity was never made.

The accumulated American grievances had some merit:

Trade barriers. India maintained some of the highest tariffs of any major economy; coupled with American corporate frustration over data localisation, retrospective taxation, and regulatory volatility, these commercial grievances found a receptive and active audience in Congress.

Procurement delays. Major defence acquisitions proceeded on decadal timelines, and the multi-role fighter competition, first tendered in 2007, was still unresolved when the rupture came.[12]

Geopolitical signalling. Expanded purchases of discounted Russian crude after February 2022 gave every India-sceptic a valid argument. Prime Minister Modi's presence in Moscow while Washington was hosting the NATO anniversary summit,[13] a moment one former official singled out, raised the question of Indian reliability before a far wider audience. He arrived on the day Russian missiles struck a children's hospital in Kyiv, and photographs of his embrace of Putin circulated against that backdrop. At a congressional hearing on 23 July 2024, members of both parties questioned the administration about the visit. And the Assistant Secretary of State for South and Central Asia told them he fully shared the dismay over its symbolism and timing, and that Washington was holding difficult conversations with its Indian friends.[14] Delhi's public answer, that in a multipolar world every country has the right to choose, restated the very autonomy the questioners found objectionable.

The Reciprocity Problem: Washington came to read India as extractive rather than reciprocal, taking advanced technology while returning less than the Pentagon expected. The belief itself made the partnership fragile.

3.2 The Limits of Top Cover

These grievances explain why a correction came, though they do not justify its abruptness, the public humiliation, or the scale of the penalties that followed. The empirical record refutes the narrative that dominated Indian commentary following the rupture, that a fundamentally sound partnership was damaged by executive caprice.[15] One assessment opposed this view. Aparna Pande of the Hudson Institute attributed the decline to the absence of institutions able to check the President, an evaluation that aligns with this paper's assessment.[16] The grievances were genuine, documented and bipartisan; the Biden principals chose not to act on them. Delhi's preference for strategic autonomy and incremental engagement consistently underestimated the shifting incentives of its partner, and that misjudgement contributed directly to the partnership's vulnerability when the shock arrived.

Autonomy Carried Political Costs: Strategic independence had a price. Russian oil, delayed defence deals and hard regulation left a wide band of American policymakers sceptical about what India intended to give back.

The outgoing Biden administration proclaimed its institutional investment in the partnership on January 6, 2025—just three weeks before leaving office—by publishing a comprehensive account of bilateral progress in critical technology, defence, space, nuclear energy, and semiconductors. It was a valedictory account meant to establish the relationship's standing for its successors.[17]

The indulgence had already survived its severest test. In November 2023, the Department of Justice unsealed an indictment alleging a murder-for-hire plot against Gurpatwant Singh Pannun, an American citizen and Sikh separatist leader, on American soil. The intended assassin was an undercover federal agent. A superseding indictment of October 2024 named Vikash Yadav, described in it as an employee of the Indian government at the time of the plot, as the officer who directed the operation.[18] An allegation that a partner government had tried to kill an American citizen inside the United States would ordinarily rupture a relationship.

Delhi established an inquiry committee and, in October 2024, confirmed, based on what the State Department had already communicated, that Yadav was no longer an employee of the Government of India.[19] Washington accepted the process, kept the matter within law-enforcement and intelligence channels, and refused to make it a public rupture. The gap between the American allegation, which concerned Yadav's status in 2023, and the Indian confirmation, which concerned his status in 2024, was the space in which the relationship was preserved.

> India took far more than it gave and successive presidents, especially President Biden, accepted it as a price to pay for greater strategic gains.

A congressional staffer, speaking off the record, still found it remarkable a year later that the matter had been contained.[20] The specialists said publicly what the staff said privately: Ashley Tellis's 2023 warning that Washington's bet on India would not pay off[21] was read within the agencies as confirmation that India was receiving far more than it gave. President Biden and his senior advisers overrode that scepticism every time, out of conviction about India's long-term strategic necessity. That was top cover, and top cover ends when the leaders who provide it depart.

3.3 The Analytical Error

Delhi drew the wrong conclusions from this style of management. By the final months of the Biden administration, on the account of several Washington interlocutors, that confidence had hardened into haughty assumption in India officialdom that it would fare better under a Republican administration unencumbered by Democratic moralising. Early signals appeared to confirm it. Minister Jaishankar attended the January 2025 inauguration, and Prime Minister Modi was received at the White House by 13 February, producing a joint statement that proclaimed a landmark year ahead.[22] The contrary indication, examined in the next section, was equally public, and yet was ignored.

A senior think tank figure, in an exchange he asked to keep off the record, called what followed India's fatal analytical error.

India's Analytical Error: Delhi read the first Trump term too closely and trusted personal rapport and Republican pragmatism. It missed how far the second term had loosened the checks on presidential action.

Delhi thought it understood the new administration on the strength of its first-term experience. It did not foresee a second-term executive determined to impose the protectionist preferences that advisers had curbed the first time. The April tariffs, at 26% under the Liberation Day schedule,[23] delivered the first correction to Delhi's assumptions, and the President's mediation claims in May completed the lesson. Delhi had studied the summitry of the first Trump term and missed the structural mechanics of the second.

American public attention to India, meanwhile, remained thin and was deteriorating. Paul Staniland of the University of Chicago described public opinion to the author as positive but shallow and unorganised.

Goodwill Is Not Political Power: A distinction existed between positive views of India in Washington and real political support for the relationship. India had support from Congress, business, and some top advocates. It had no champions in the executive and few people paid a political price when things went wrong. Goodwill alone turned out to be weak protection.

By early 2025, Pew Research found American opinion of India almost evenly divided, 49% favourable against 48 % unfavourable, and that reading was taken before Operation Sindoor and the tariff escalations. By the spring of 2026 the line had crossed. Pew's survey of February to May that year found 45 % favourable and 50 % unfavourable.[24] This is among the lowest ratings since the question was first asked in 2008, and the third successive decline from 51 % in 2023. Kunal Singh of the Massachusetts Institute of Technology put it more bluntly, describing India as 'page seventeen news' in American political discussion.[25]

American Opinion about India Deterriorates: By mid 2026 more Americans viewed India unfavourably, the first time since 2008.

Japan's standing in Washington is based on corporate integration and decades of treaty dependence, which generate domestic costs when the relationship is damaged. India had friends rather than costs. The Congressional India Caucus was among the largest of its kind, defence contractors had real commercial stakes, and Congress had written India into legislation. But none of that translated into pressure on a President who moved against Delhi, because no member faced a constituency that would punish silence. What India lacked was not goodwill in Washington but anyone who would pay a price for its loss.

4 Anatomy of the Rupture: The Decision System

The break occurred in three parts, each one bearing the President's personal signature.

The first came in May. Operation Sindoor, India's strikes on terrorist infrastructure in Pakistan after the massacre of twenty-six civilians at Pahalgam in Kashmir on 22 April 2025,[26] led to four days of escalating exchanges between two nuclear-armed militaries before the fighting ceased on 10 May. The ceasefire was announced from Washington, on the President's social media platform, before either belligerent could announce publicly.[27] President Trump claimed he had ended the fighting by threatening both sides with the total loss of American trade, and went on to claim on more than twenty public occasions that he had prevented a nuclear war.[28] Each claim of this third-party mediation was firmly denied by Delhi. In June, diplomatic injury became political insult in a photograph: Field Marshal Asim Munir was hosted at lunch in the White House, the first serving Pakistani army chief so received without civilian leadership present, weeks after his forces had exchanged fire with India's.

Delhi's denials were structural, but President Trump read them with vexed irritation. Since the 1972 Simla Agreement, India has held that its disputes with Pakistan were strictly bilateral and admit no external mediator.[29] This is a principle every government has upheld for fifty years. The domestic stakes were serious. Opposition leaders in Parliament demanded to know why the operation had been halted. Each presidential claim gave Prime Minister Narendra Modi's critics a fresh charge that India was taking instructions from Washington. A leader elected on a promise of unyielding national strength could not be seen to concede. Acknowledgement was politically impossible for Modi at any price.

The second shock came in August, when tariffs rose to 50%, half of it stated explicitly as a penalty for buying Russian crude. This came even as China purchased it in far greater quantities without equivalent consequence.[30] The third blow was delivered in September: a fee of $100,000 on new H-1B petitions, followed by proposals to abolish the post-study work routes that fed the talent pipeline.[31] Within four months, each of the three pillars of the relationship, trade, security and migration, had taken a direct blow. Every measure had been announced personally by the President and often to the visible surprise of his own agencies.

4.1 The Principal, the Circle, and the Coalition

The fieldwork interviews confirm the internal architecture that produced this pattern.

Consider first the principal. Lisa Curtis, who directed policy on the Indian subcontinent at the National Security Council in the first Trump administration, drew a sharp contrast between the two. In the first term, the President was somewhat restrained by advisers willing to challenge poor policy. In the second term, he was emboldened. Her reading of the mediation claims identified the problem in preparation rather than temperament. President Trump did not understand why the Indians would not give him credit for helping to arrange a ceasefire between New Delhi and Islamabad. He appeared not to have been briefed on the history of the India-Pakistan dispute, nor to grasp, or particularly care about, India's sensitivity to third-party mediation.[32]

On ideology, Joshua White made a complementary point, warning that it is a major mistake to seek a coherent Trump doctrine towards India. The drivers were instinct, grievance and domestic political theatre, with formal strategic justification provided by advisers afterwards. Administration hawks had sought pressure on India's energy purchases for months; the President supplied the 50% figure and the punitive tone himself.[33]

Jeff Smith of the Heritage Foundation, among the relationship's most consistent advocates in Washington, told a congressional subcommittee in December 2025 that the friction was two irritants coalescing: recent frustration over Russian oil purchases, and longstanding discontent with Indian trade barriers. India felt blindsided, he said, but New Delhi was far from blameless.[34]

The court around the President was arranged to convey executive instincts rather than buffer them. Jean Garrison of the University of Wyoming, who specialises in presidential advisory systems,told the author that under the second-term personnel system loyalty was the primary criterion, with institutional experience the casualty. She observed acutely, in an interview with the author, that there was no formal advisory process to examine, merely an inner circle in which absolute loyalty was the condition of entry.[35] Patrick Cronin of the Hudson Institute said the executive demanded complete public agreement and actively pursued those who withheld it.[36]

The Inner Circle Replaced the Filter: The advisory system was rebuilt to carry the President's convictions rather than test them. The distance between impulse and foreign policy narrowed to almost nothing.

The practical effect on India policy was immediate. Although the President's advisers may have understood India's limits on market access for American goods, President Trump himself had long regarded India's trade barriers as unfair and imposed some of the highest tariffs ever applied to any country.[37] On the one cabinet principal with institutional reason to protect the relationship, Curtis was direct: Secretary of State Marco Rubio had supported US-India relations, but with his own political future in view, he would never stand up to President Trump.[38]

Beneath the courtiers sat the governing coalition, which refutes the common Indian belief that the rupture was one man's whim. Paul Staniland's research locates the cause in a structural condition: public support for India is broad but shallow, while within the ruling coalition sits an intense minority whose organising concern is restricting immigration.[39] In American politics, intensity outweighs breadth. As the electoral scholar Ryan Williamson noted, American politics has become thoroughly nationalised; opinion flows downward from party leadership, and legislators answer to primary voters rather than to the median voter.[40] Once the President stakes out a position, as Williamson put it, the rest of his party is stuck having to toe the line, and this is not Donald Trump specifically; it is nationalised politics broadly.

One documented instance shows the mechanism. On the day the April tariffs were announced, Laura Loomer secured a meeting with the President and handed him a list of national security officials she deemed disloyal; he listened, and acted on it. A congressman arrived mid-meeting with a list of his own. The operating principle, as Maggie Haberman of the New York Times and Jonathan Swan of Axios describe it, is whatever is in front of him, followed by an instruction to an aide.[41] The difference from the first term is one of staffing rather than temperament: the first chief of staff tried to schedule the President's mornings and monitor his telephone calls, and neither attempt survived. The second-term staff worked with his preferred state rather than against it. The second term allowed presidential impulse to translate directly into policy, bypassing the procedural safeguards that once mediated executive decisions.

This situation was clearly visible in real time. In December 2024, the decision to appoint Sriram Krishnan, an Indian-American, as White House adviser on artificial intelligence led to an open racial online campaign from the nativist faction of the coalition.[42] At first the President refused to go along with it, stating to the New York Post that he had "always liked the visas".[43] However, by September 2025 the President had introduced the $100,000 fee, and by mid-2026 the restrictions had been applied to student pathways in the STEM fields as well.[44] The sequence shows the intense minority moving the President to the opposite of his stated position within nine months.

No Republican member of Congress publicly defended the visa program, a rational choice given the prevailing political incentives.

Intensity Beats Breadth: India's support in American politics was wide and thin. The restrictionist groups were smaller and far more active. In a national system, intensity moves a President more than breadth.

The response of industry shows the same pattern operating on a larger constituency. In December 2024, the technology sector had argued its case to the President directly and won. In September 2025 it did not argue at all. Microsoft, Amazon and JPMorgan sent urgent instructions to visa holders not to travel[45] and firms began considering hiring offshore. The Chamber of Commerce, representing three hundred thousand businesses, went to court against Trump's administration.[46] Nineteen states followed in December.[47]

Litigation as a Measure of Failure: The technology industry addressed visa restrictions in court rather than in meetings. Firms with large stakes had judged the slower judicial route better than their access to the administration.

The constituency with the most at stake had concluded that persuasion was no longer available and that only litigation remained, which took a further nine months to produce a ruling. To put it simply, the incentive structure made it rational to remain silent.

While New Delhi traditionally benefited from broad strategic goodwill, it lacked a mobilised institutional constituency in Washington. As Richard Rossow, who holds the India chair at the Center for Strategic and International Studies, observed to the author, the resulting gap was as much structural as ambassadorial.[48] In the second Trump administration, no senior figure owned the India portfolio, and the one effective channel, Sergio Gor's role as ambassador and envoy in New Delhi, came very late, in February 2026. The absence of such a figure severed a multi-decade lineage of cabinet-level champions inside the US executive branch who actively protected the strategic partnership from domestic trade, regulatory, and legislative pressures: Ash Carter, as Defense Secretary under Obama, drove the early defence technology agenda; under Biden, Kurt Campbell coordinated Indo-Pacific policy, Lloyd Austin carried the defence relationship, and Jake Sullivan ran the technology initiative from the White House.

The Indian-American community, 5 million strong and under 2 % of the population,[49] was concentrated in electorally uncompetitive districts and politically divided. It could not substitute for an organised lobby. Heightened immigration scrutiny drove professionals and community organisations towards caution and lower visibility.[50] Unlike Japan, whose Washington constituency was built through corporate integration and decades of explicit treaty dependence, India had no institutional machinery able to absorb the shock when executive goodwill vanished.

4.2 The Pakistan Test

The Pakistani dimension of the rupture requires separate evaluation, as it represents the element Indian analysis has treated most emotionally and least precisely. Disentangling it requires separating two operational layers: the structural crisis response of the American national security apparatus, and the highly personalised transactionalism of the executive branch.

4.3 The Structural Layer: Access Asymmetry

The first layer is structural and would have shaped Washington's response under any administration. When two nuclear-armed states exchange direct military strikes, the instinctive reaction of the American system is immediate crisis containment: halt the firing first, weigh the merits later. The stabilisation reflex is neutral in principle and asymmetric in effect, since it favours whichever side moves fastest to shape Washington's real-time perception of the escalation.

Neutral in Theory, Asymmetric in Practice : The instinct to separate nuclear armed states looks even handed and rewards whoever reaches the American system first. Crisis management becomes a contest for access and framing.

Rawalpindi was single-mindedly focused on gaining favour and access with the President and his circle, and it began by giving. The handover of the alleged Abbey Gate facilitator in March 2025 supplied a counter-terrorism trophy, and General Michael Kurilla at Central Command became its most senior advocate inside the American system.[51] Kurilla told Congress in June 2025 that Pakistan was a phenomenal partner in counter-terrorism.[52] On 26 July, at Aiwan-e-Sadr, President Zardari conferred on him the Nishan-e-Imtiaz (military), Pakistan's second highest decoration, in an honour rarely given to a serving foreign officer, with Munir in attendance. In November 2025, the 27th constitutional amendment gave Munir command of the nuclear enterprise and immunity for life.[53] The Trump administration's silence to this dilution of democracy in Pakistan conveyed acceptance.

The courtship at the top was matched by volume below it. Filings under the Foreign Agents Registration Act for April and May 2025 show the extent of the imbalance.[54] During the crisis period, Pakistani-retained lobbyists recorded more than sixty direct engagements with American policymakers, against four by Indian representatives.[55] Patrick Cronin of the Hudson Institute saw the machinery at work. He suspects some of that money went towards public relations; his own telephone rang repeatedly during the crisis, while no equivalent Indian communication arrived.[56] India later engaged Washington firms of its own, too little and too late; the deficit that mattered existed while the crisis was being framed. The lobbying disparity did not create Washington's preference for de-escalation, but it ensured that when Washington sought a framing of the crisis, the one at hand was Rawalpindi's.

4.4 The Personal Layer: Flattery, Finance, and Access

Pakistan's courtship of the Trump administration predated the crisis, laying the ground for such a choice.

In early 2025, Pakistan transferred the alleged facilitator of the Abbey Gate bombing to American custody, earning public presidential praise.[57] As the veteran journalist Seema Sirohi observes, Rawalpindi ran a coordinated campaign aimed at the President's personal drivers: high-value handovers, commercial proposals, strategic flattery, and offers of critical minerals, each aimed at something the President wanted.[58] In the assessment of Amit Trivedi, formerly of the early Biden administration and now at The Asia Group, working-level de-escalation in Sindoor was handled by Secretary Marco Rubio and Vice President JD Vance.[59] At the same time, the President took personal credit for stopping the conflict. The repeated mediation claims placed Islamabad on the same footing as New Delhi, treating the crisis as a quarrel between two equivalent parties rather than between a long-standing partner and its adversary. The June lunch went further, subordinating Pakistan's civilian leadership beneath its military chief. The elevation persisted well beyond the crisis.

At the US-Iran talks in Switzerland in June 2026, Vance told reporters that the two most important people in his life were an Indian and a Pakistani, the Indian being his wife and the Pakistani Field Marshal Munir. He added that he had spoken to Munir more often than to anyone else over the previous three months, and would not have been there without Munir's statesmanship.[60]

The commercial aspect was reinforced by the fact that, a few days after the Pahalgam attack in late April 2025, executives from World Liberty Financial, the crypto venture linked to the President's family, travelled to Islamabad. They then entered into a letter of intent with the Pakistan Crypto Council and met the Prime Minister, the Army Chief, and several senior cabinet ministers.[61] By January 2026, the arrangement had developed into a formal memorandum of understanding on stablecoin architecture, which Prime Minister Shehbaz Sharif, Field Marshal Munir, and the intelligence chief signed.[62] Midway through 2026, Pakistani officials stated that no pilot projects, licensed platforms or commercial transactions

Access Shapes the Crisis: Pakistan's advantage in Washington is simpler than lobbying deciding policy. Decision makers respond to the framing put in front of them, and access gained through favours and lobbying settles which framing arrives first.

had taken place under the agreement. At the same time, the venture had earned somewhere in the region of $500 million for the President's family. Though none of this money was directly supplied by Pakistan, Islamabad offered something far more valuable than revenue: proximity.[63]

An arrangement of maximal ceremony and no operational implementation amount to secured political access rather than policy. As one former senior US official put it, business dealings of this kind could be influencing the President's attitude towards Pakistan, which "certainly shouldn't be" how policy towards a nuclear-armed state is made, "not to mention that's corrupt".

The proposition that personal channels drive American policy is not based on the Pakistani case alone. In the same period, on the reporting of Haberman and Swan, a foreign leader presented the President with scenarios for regime change in Iran that his own Director of Central Intelligence called farcical and his Secretary of State rejected in blunter terms. The President proceeded regardless, remarking that the consequences would be someone else's problem.[64] The pattern matters more than the particular case. In a decision system where a foreign principal with direct access can push an argument past the assessments of the President's own agencies, flattery, proximity and commercial relationship are instruments of statecraft rather than ornaments of it.

4.5 Strategic Implications

The Pakistani leadership evaluated the President's personal incentives with professional precision.

By nominating him for the Nobel Peace Prize in June 2025, Islamabad secured a level of executive intimacy that Delhi's traditional caution and inhibition never sought.[65] The conclusion is uncomfortable for Delhi and unavoidable on the evidence. Delhi misread which layer governed. Rawalpindi correctly addressed the individual holding power, while Delhi addressed the institutional relationship and overestimated its durability. In a personalised executive system, the principal's preferences effectively define policy.

No matter who was responsible for the attack in April, the concrete results — mediation credit, a White House lunch, a rise in military status and commercial access — had created an incentive system that rewards people for starting a crisis. That is to say, this type of system makes future escalations more likely, regardless of who starts them.

These layers have different durations of existence; while the personal and financial channels might not survive the present administration, the tendency towards quick crisis containment will continue. India's access deficit in Washington is still a vulnerability that it has brought upon itself and which no change of administration will automatically eliminate.

Personal Channels Turned into Instruments of Statecraft : Within a personalised executive system, flattery, commercial proximity, and direct access can influence policy outside formal institutional channels. These can be effective instruments, beyond formal diplomacy, through which foreign governments gain the attention and favour of the principal decision-maker.

Delhi and Rawalpindi Addressed Different Systems:Delhi invested in institutions and Rawalpindi in the man holding power. Delhi's method suits a conventional administration. Here the formal structure and the real decision point had come apart.

The decision system determined the particular form that the 2025 rupture would take. Still, it had no bearing on the wider repricing of the partnership, which came before and is supported by documentary and bipartisan evidence. Before looking at that structural change, the analysis considers why America's institutional checks were unable to restrain executive action.

5 The Institutional Test: Constraints That Arrived Late and Achieved Little

The American checks on executive action worked, but too late and too partially to protect a partner. The system of separated powers is widely regarded, perhaps even more so by foreign partners, as an automatic way of correcting abuses by the executive. The crisis of 2025 provided a realistic test of that belief. For a long time, India has taken it for granted that the institutional self-correction of the United States is both quick and reliable. It is not.

5.1 The First Branch: Congressional Paralysis

Under the Constitution, Congress, as the first of the three branches, had all the statutory tools necessary to place limits on the executive's action in raising tariffs. The tariffs in question came from a law which Congress had itself drafted, the International Emergency Economic Powers Act. But they were being used for purposes entirely different from those originally intended by its drafters.[66] Nevertheless, no legislative restriction was imposed.

Congress Is a Slow Constraint: Congress constrains through law, budgets and oversight, and it works in years rather than days. Members also risk more by crossing their own President than by ceding institutional ground.

James Lindsay, who is the senior vice president of the Council on Foreign Relations, attributed this lack of action in interview to structural incentives rather than to individual cowardice.[67] Yet in both cases the results are the same. Each member has to face what he calls the legislator's dilemma: the political repercussions for opposing a President from one's own party are directly felt by the individual. On the other hand, the advantages of upholding institutional authority benefit the institution as a whole, not any single member.

Soren Dayton of the Centre for American Innovation, who has extensive experience in Republican congressional politics, attributed the structural failure to 1983, the year the Supreme Court ruled in the case of INS v. Chadha that the legislative veto was unlawful.[68] Until then Congress had retained the power to cancel executive actions taken under delegated authority, by resolution and without the President's assent. After Chadha it could no longer do so. Since the Chadha decision, Congress has been able to recover any powers that have been delegated to it only by obtaining veto-proof majorities against an executive who is certain to use a veto. Such majorities cannot be achieved in a polarised situation. The emergency laws enacted on the basis that the executive would follow norms and be vulnerable to institutional embarrassment. Today they have to deal with an executive who consistently and deliberately ignores norms and seems incapable of embarrassment.

The resistance in Congress took a more subtle and procedural form. According to a senior congressional staffer, the toolkit available to them consisted of sending back oversight letters without answering them, including appropriations riders, placing holds on presidential nominations, and holding hearings to build up an evidentiary record for use in later sessions.[69] This kind of procedural obstruction works over periods of several years and had no effect during the four crucial months of the crisis.

The main means of institutional resistance was the National Defense Authorization Act for Fiscal Year 2026, which was enacted in December 2025.[70] This act included clauses that were subtly inconsistent with the position taken by the White House. It protected defence-industrial cooperation with partners that the executive branch had been alienating throughout the year. The NDAA is still the only channel through which institutional preferences can be preserved, simply because it is a necessary annual piece of legislation with a veto-proof precedent. Passed annually with veto-proof majorities, it serves as the single most dependable mechanism for converting congressional priorities into law. As a result, India is shown in a much more favourable light in the congressional NDAA than in any strategic document under the control of the White House.

5.2 The Vanished Interagency

The first vetting of any American policy is by the executive's own apparatus, and it failed even before any external check came. Haberman and Swan describe a government run by about half a dozen people in the room with the President, with senior officials elsewhere learning of major decisions only after they are taken, often through social media. The National Security Council's interagency process, historically the means by which departments were brought into a decision before it became one, no longer performs that function. :::{.aside}

Absent Process: Without a working interagency process, partners lose the forum where they made their case before a decision. Diplomacy is then arguing with a process that has already been bypassed.

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The record examined in this study shows the consequence. The tariff rates, the visa fee and the mediation claims were each announced without the staffing that would normally precede them. This was why they reached the President's own departments as surprises rather than instructions. For a foreign partner, the implication is procedural rather than political. There is no longer a dependable stage at which a partner's case can be considered before a decision is made, because the stage itself has been abolished.

5.3 Judicial Time against Commercial Time

The judiciary asserted itself more firmly, but on a delayed timeline. In Learning Resources, Inc. v. Trump, decided on 20 February 2026 by a vote of six to three, the Court ruled that the International Emergency Economic Powers Act does not give the President the power to impose tariffs.[71] This decision was a real assertion of the constitutional checks and balances. Yet it did not come until after serious economic damage had already occurred: contracts had been cancelled, supply chains had been diverted to Vietnam and Mexico, and export livelihoods had been disrupted in the manufacturing centres of Gujarat and Tamil Nadu.

Scott Anderson of Brookings and Lawfare points to the temporal flaw.[72] In his account, courts correct legal instruments, rarely executive conduct, and never the intervening interval. An executive willing to act unlawfully for eighteen months gains the commercial effects of those months. However, the diverted capital, broken supply chains and reoriented trade routes, are not reversed by a later ruling. The administration treated adverse rulings as scheduling setbacks and re-issued the measures under different statutory authorities. The sequence is difficult to comprehend: the trade arrangement with India was announced on 2 February 2026 and executed on 6 February; the Court ruled a fortnight later, and all tariffs imposed under the Act ended on 24 February. Whether the Court restrained the President or ratified a retreat already underway remains unclear.

5.4 The Pentagon's Two Voices

In the executive branch, there was evident friction in the form of differing strategies in the official documents. The Pentagon's China Military Power Report and the National Defense Strategy both regarded India as important for maintaining the regional balance.[73] The White House National Security Strategy, however, almost ignored the Indo-Pacific partner on which that regional assessment relied. Cronin noted that while the Pentagon had a formal strategy, the White House relied on executive instinct, the two approaches existing side-by-side without any resolution from either institution.[74]

Military autonomy was also brought under political control, since the dismissal of senior officers who gave inconvenient testimony or who resisted the deployment of forces domestically sent a clear message throughout the officer corps.[75]

Andrew Grossman, a legal scholar from Georgetown, gave a more optimistic evaluation of the institutions.[76] He said that even though the executive branch's aims tended towards a personalised state, the American system is still too complex, decentralised and federal in structure to be fully influenced within a four-year term. He believes that the constitutional system will survive this kind of pressure as it has in previous crises.

The evidence from empirical studies points to a necessary amendment of Grossman's thesis. Although institutional thickness safeguards the wider constitutional structure, individual actors within it are driven by immediate personal interests. The institutional framework remained unscathed, but the individual professional careers did not.

5.5 The Silence of the Beltway

The final safeguard is the least formal and was the most damaged during the 2025 rupture: Washington's expert ecosystem of think tanks, former officials, and foreign policy scholars whose public criticism historically imposed reputational costs on poor policy.

Cronin was very open about his own calculation, clearly pointing out that if one opposes the government openly, then retaliation will be directed at both one's livelihood and one's family.[77] He conveyed that this is why professionals refrain from making negative public comments and save their frankness for private discussions. He called it being silenced in public, and he spoke in the plural, of himself and of others like him.

Three other observations from the fieldwork indicate the same trend. A large number of the interviews could be carried out only on a background basis, that is to say by analysts who, in previous similar positions, had regularly criticised administrations by name. Another seasoned analyst pointed out that invitations from the administration's circle no longer reach people of moderate political views, since those who have influence are either serving or are already compromised through association. Conservative institutions were the most reluctant to engage, which is the more telling finding, since fear of the administration explains the caution of its critics but not the silence of its own ranks.

The foreign policy environment which Indian diplomacy assiduously developed over two decades — the network that used to challenge anti-Indian statements in print within a few days — still holds the same views but says nothing in the public debate. In practice, the effect of remaining silent in public is the same as there being no stance at all.

Stilling Critical Voices : This administration targets critics relentlessly, and hence self censorship has become widely prevalent in the thinktank community and media.

5.6 The Balance Sheet

To summarise the institutional audit:

The executive's own machinery. Dismantled the interagency stage at which a partner's case was once heard.

The judiciary. Curbed the legal instrument, but only after commercial damage was done.

The Congress. Through important legislation, restricts policy at the margins over several years.

The Pentagon. Preserved its documented strategic preferences while losing internal dissenters.

The expert community. Maintained its analytical judgement while losing its public voice.

Grossman's argument regarding the structural durability of the system is still correct in that the state was not taken over and no fundamental institution was ruined beyond repair.[78] However, constitutional safeguards function on a timeline measured in legislative sessions and judicial schedules, while the diplomatic damage in 2025 was caused in just weeks. Thus, the difference to a foreign partner between a system that fails and one that recovers after eighteen months is of no practical significance. The period during which the system is distorted is the main threat. Therefore, India's planners as well as all other partners must from now on assess American commitments having explicitly taken into account this time lag.

Recovery Can Still Mean Failure: Courts, Congress and bureaucracies may correct executive overreach in time. Partners carry the damage meanwhile, and commercial and diplomatic losses rarely reverse on a late favourable ruling.

6 Structure Confirmed: Doctrine and the Partner System

Once strategic repricing is enshrined in statute, it outlives the administration that drafted it. If this rift were merely a reflection of one leader's decision-making style, a change in power would resolve it. The documentary evidence reveals an institutionalized shift that will endure beyond any leadership transition. Across the 14 months from May 2025 to July 2026, the repricing of American partnerships was incorporated directly into presidential statements, official strategy, tariff regimes, military command structures, and proposed legislation, imparting a durability that informal political trends lack.

The National Security Strategy of December 2025 serves as the foundational text.[79] Its organising concerns are explicitly domestic: sovereignty, border enforcement, and internal security. Its external posture centres on regional spheres of influence, demonstrated immediately after promulgation by the intervention in Venezuela and the coercive posture over Greenland. The Indo-Pacific, the principal theatre of three predecessor strategies, was marginalised, with India mentioned only in passing. The National Defense Strategy omitted India entirely. Cronin observed that while the Pentagon's regional calculus logically requires India, since no coherent Indo-Pacific strategy exists without it, officials drafting documents for executive signature declined to feature a partner then in presidential disfavour. The strategy was drafted to accommodate executive sentiment.

By June 2026, the Pentagon had restored the Indo-Pacific Command to its earlier name, that of Pacific Command,[80] taking away the prefix which had been introduced to indicate India's central role. The Department presented the change as being about preserving historical heritage and privately assured Indian military representatives that there would be no effect on operational linkages.[81] Nevertheless, the message sent overseas was clear: a partner's position in US strategy could be determined from its title, and that title was dropped in the same year that the strategy documents stopped referring to India. Executive decisions always affect the structure of institutions, whether or not this is done with intention.

6.1 Allies Against Partners

The comparative treatment of treaty allies and non-treaty partners shows that the repricing is structural. Ankit Panda, a nuclear and Indo-Pacific specialist at the Carnegie Endowment, frames the difference as one of risk allocation.[82] Treaty allies staked their national security on permanent American commitment and gave up other strategic options. Partners such as India, however, hedged and tolerated decades of American irritation to keep the option of multiple alignments. The 2025-26 crisis tested both. Denmark faced public threats over Greenland; Canada absorbed punitive tariffs and annexation rhetoric; Seoul and Tokyo received troop-cost ultimatums.

As Amitav Acharya of American University observed, the decline of the American-led order preceded this administration, making executive volatility a symptom rather than the principal cause.[83] Panda's central insight bears directly on New Delhi: treaty allies have now learned what India long assumed, that isolationist strains in American politics recur, and that no treaty offers permanent insurance. India's strategic autonomy was therefore comparatively vindicated. Section VI returns to the limits of that vindication.

Rick Rossow identifies operational integration as the currency of Washington's strategic hierarchy. Compared to countries that send combat forces alongside American troops in wartime, bilateral exercises and technology transfers count for little. India's doctrine of strategic autonomy makes such participation unlikely, and that is the structural price autonomy carries in the American system.[84]

The two findings reconcile: autonomy is insurance, and insurance carries a premium, protecting against American unpredictability at the cost of priority in American planning. Delhi has paid that premium for decades, and in 2025 the policy paid out. Yet, as Rossow noted, American observers largely missed the progress made under Biden, when India conducted operational missions under a US-led regional command through the Combined Maritime Forces, a step previously thought impossible.

Insurance, Not Immunity: Autonomy was partly vindicated, since treaty allies also found formal promises bought no special treatment. It shields India from volatility and lowers India's claim on American planning.

6.2 Treatment According to Leverage

If the strategy documents recorded India's downgrade in words, the tariff schedule recorded it in figures, and exposed the logic behind the whole re-evaluation. Half of India's 50% penalty was tied directly to purchases of Russian crude, even while China bought more of the same crude without punishment, and as Washington itself was pursuing a diplomatic opening towards Moscow over Ukraine.[85] The penalty reflected naked leverage, not principled conduct.

The comparison is not hypothetical: Washington applied the same instrument to both. When tariffs were escalated against China, Beijing answered with export controls on rare earths. Washington softened its position in the weeks before the April 2026 summit between the two Presidents.[86] India, holding no comparable instrument, absorbed the penalty for six months and obtained relief only by conceding the substance of the American demand on Russian crude. As a former National Security Council official who worked on China policy in the Biden administration put it, Beijing's export controls left Washington visibly constrained before the summit: the tariff weapon bends before counter-leverage and falls hardest on those without it. What separated the two cases was not the conduct penalised but the capacity to impose a cost in return.

The Real Currency Is Counter-Leverage ; The tariff case hinged on the capacity to retaliate rather than on principle. China had leverage and India had little. Treatment is based on the cost a partner is able to impose.

In July 2026 the asymmetry began changing from executive discretion into statute. The Sanctioning Russia Act, introduced on 14 July 2026, three days after Lindsey Graham's death and named for him, gathered more than sixty co-sponsors within the week and would impose 100% tariffs on the five largest buyers of Russian energy.[87] India and China are among those named, along with Slovakia, Hungary and Azerbaijan. A parallel clause covers the five largest buyers of Russian natural gas, exempting any country whose purchases fall below 15% of Russia's total gas exports. The threshold shields lower-volume European buyers by formula, while India, whose oil purchases had fallen under the February 2026 agreement, receives no comparable relief. The bill passed the Senate on 7 August 2026 by eighty-six votes to eleven. Sixty-two senators had co-sponsored it, twenty-one of them Democrats. Amendments moved by Ron Wyden and Rand Paul to remove the tariff powers were defeated, and the bill went to the House.[88]

Three features of that vote impact the argument here. The first is its breadth: not a party-line outcome that a change of administration would reverse, but four-fifths of the Senate, most of the opposition included, voting to write into law a differential treatment that names India. The second is its timing. In February the Supreme Court had struck down the President's tariffs for lack of statutory authority.[89] In August, the Senate voted almost without dissent to grant the precise statutory authority the Supreme Court had found lacking six months earlier, and to place it beyond the reach of future judicial challenge. The branch that had checked executive power was effectively overridden by the branch that embraced it. The third dimension is the most significant. India was not weighed against Ukraine in that vote and found wanting. India was not weighed at all. A bill targeting Russian energy named India among its targets, and no senator faced a constituency that would ask why. Should it pass into law, the measure would represent the first congressional authorization of tariffs as a tool of war finance, writing a double standard directly into statute.

For this paper's thesis the provenance matters more than the bill's eventual fate in the House. It is bipartisan, it originates in Congress, and it comes from the institution Indian statecraft has long treated as the stabilising pillar of the relationship. The repricing of India is no longer a matter of executive judgement alone; it now carries congressional co-sponsorship.

Congress Is No Longer Automatic Insurance: Indian diplomacy has treated Congress as the anchor. The NDAA and budget processes still work that way. Congress can also legislate against Indian interests when the politics point there.

The same month showed the corresponding pattern for Pakistan. Days after Islamabad's mediating role in the Iran negotiations, which offered the president a way out of a war he was struggling to end, Finance Minister Muhammad Aurangzeb met Treasury Secretary Scott Bessent in Washington and requested a bilateral exchange stabilisation facility of $10 billion. [90] A US official confirmed the request; no decision has been announced, and reporting from Islamabad suggests its prospects rest on the President's judgement rather than a Treasury assessment. What converts into financial consideration within days is service to the President personally. Strategic partnership without it does not.

6.3 The Personal Channel

The fact that the policy changes went through the President shows how the process worked. This is clearly shown by the move in February 2026. The relief of tariffs came by two separate measures: on 6 February an executive order abolished the extra 25% duty attached to Russian crude in return for India agreeing to stop making those purchases; at the same time, the reciprocal rate was reduced from 25 to 18%, effective from 7 February.[91] Cronin attributed this success directly to Sergio Gor's being in New Delhi, a point which is backed up by Foreign Policy's analysis of the agreement.[92]

The American ambassadorship in Delhi had remained unfilled throughout the crisis, from Eric Garcetti's recall in January 2025 until Gor presented credentials on 14 January 2026. The interim trade agreement followed within three weeks of his taking up the post.[93] Gor's effectiveness came from his standing with the President rather than from diplomatic experience. He had run the White House Presidential Personnel Office and was a publishing partner to the President's son.[94] A system that ran through one man required a channel to that man before anything could be undone. Until it existed, policy stayed frozen. Three acts in six months, each undoing the last, and only one of them the product of a deliberative process. The American state no longer holds a position long enough for a partner to plan on it.

To deal with this situation, one has to discern between a political rupture and ongoing operational activity. During the entire period of escalation, the bilateral defence agreements, military exercises, and arrangements for sharing intelligence carried on without interruption. It was the political aspect, the part which in Washington prizes and defends those agreements, that suffered the rupture.

The fact that Gor was appointed sent a quiet message to Delhi: by being given the role of Special Envoy for South and Central Asia, his responsibilities included India within a single regional arrangement together with Pakistan. In 2009, the Obama administration suggested Richard Holbrooke as a regional envoy with responsibility relating to India and Kashmir.[95] Delhi strongly objected, and was successful in having his mandate limited to Afghanistan and Pakistan. This arrangement was seen in both capitals as an acknowledgement of India's important strategic position. In 2025, however, the same kind of regional pairing was announced without consulting Delhi and accepted without any protest. The Indian ambassador publicly welcomed the nomination.[96] The difference revealed Washington's lack of regard for India's long-standing regional sensitivities. That India raised no objection showed Delhi's readiness to put functional access before diplomatic principles.

India also swiftly responded structurally in other areas. Having negotiated for sixteen years, New Delhi finally reached a landmark Free Trade Agreement with the European Union and established a new security and defence partnership with Brussels as well.[97] What had previously been India's policy of hedging has now become a tangible, concrete reality through actual agreements. The strategic diversification that Washington had resented was in fact speeded up by its own coercion. This trend can be seen throughout the wider partner system, in the form of European rearmament, Ottawa's middle-power coordination, and diplomatic readjustment in the Gulf.

6.4 The Doctrine Stated in Delhi

The new American doctrine was conveyed to Delhi three times in 2026, twice in the language of strategy and once, more bluntly, in that of commerce.

Landau and Colby: Two Departments, One Warning: Months apart, Landau at State and Colby at War stated the same paradox from different departments. Washington asks for deeper strategic and economic alignment while warning against India becoming either a commercial competitor or an independent centre of power. American policy welcomes Indian capability and resists the autonomy that capability produces. Two arms of the executive have now put both the ceiling and the scope of the partnership on record.

On 5 March, Christopher Landau, who is Deputy Secretary of State, began the Raisina Dialogue with a statement that was unusually open about the terms in question. He stated that the trade agreement was nearly complete and that the partnership had almost unlimited potential. He added that it was in the United States' own interest to have a partnership with India. He invited Delhi to go beyond the Cold War approach under which India had kept America at arm's length. His warning was blunter than diplomatic convention usually permits. India should understand, he said, that Washington would not make the same mistakes with India that it had made with China twenty years ago: "We are going to let you be able to develop all these markets and the next thing you know, you are beating us at many commercial things." He said it in Delhi, at an Indian government conference, a week into the Iran war, with Khamenei dead and half a dozen Gulf states under missile attack. He was describing, in the language of permission granted or withheld, exactly the kind of authority his country had spent the preceding week demonstrating by force in the region next door.[98]

The response in India was both quick and negative. But the most pointed comment came from Beijing, where the Global Times questioned the claim that China's rise had taken place because Washington had allowed it.[99] This question revealed the underlying assumption in the statement, that a partner's economic course is a privilege the United States grants or withholds. The two points made in Landau's speech do not go well together. India was asked to give up the strategic autonomy that the evidence in this paper indicates has been advantageous to it, in return for a partnership specifically intended to ensure it never competes.

Elbridge Colby, Under Secretary of War for Policy and the principal author of the administration's China strategy, advanced the same proposition in the strategic domain across two statements four months apart. In March 2026, he went to Delhi to implement the defence framework agreed the previous year and told an Indian audience that India was a key partner in securing a favourable regional balance. He was specific about what that meant: long-range precision fires, resilient logistics, maritime domain awareness and anti-submarine warfare — capabilities offered warmly, but within an American-led framework.[100] In July he addressed the other half of the proposition, dismissing collective middle-power arrangements as a distraction unconnected to actual power dynamics and cautioning partners against investing in structures outside that framework.[101]

The immediate target was Canadian diplomatic posture, though the structural message applied broadly. Four months separated the two statements, indicating a deliberate doctrine rather than an impulse. Read together, they formalise a clear logic that while partner capability is welcomed, partner autonomy invites suspicion, and any diplomatic insurance a partner purchases against American unreliability will be interpreted as strategic disloyalty.

New Strategic Mantra: Partner capability within the American system is welcome; autonomy enhanced by that very capability is disloyalty.

Although Colby omitted explicit reference to India, in contrast to Landau's address in New Delhi four months prior, the underlying doctrine applies directly to the strategic realm. India's multi-vector architecture — the Quad, bilateral security ties with France, regional trilaterals and EU frameworks — represents the exact form of strategic autonomy this new posture seeks to curb. A doctrine formulated with Ottawa in mind does not exempt New Delhi. The cautious strategic positioning India consolidated in 2025 is precisely the behaviour the new rule penalises.

Landau and Colby articulate two versions of the same hierarchy. Landau's message is economic: India may prosper, but Washington does not intend to repeat with India what it believes it did with China. Colby's is strategic: India may become militarily stronger, but that strength is valued principally when it serves a favourable American balance of power. Neither man was setting out a doctrine on the other's ground, and the two departments have not coordinated their language. That is what makes the convergence significant. A commerce official and a defence official, addressing Indian audiences four months apart, described the same boundary from opposite sides: a partnership that welcomes Indian capability while remaining uneasy about independent Indian power.

Considered cumulatively, the fourteen-month record documents a comprehensive structural shift:

Strategy. A framework that deprioritised the primary theatre of Indian influence.

Doctrine. Defence policy documents that omitted India even while planners acknowledged its operational necessity.

Command. The reversion of Indo-Pacific Command to its former name, Pacific Command, executed with bureaucratic indifference.

Tariffs. Penalties calibrated strictly for retaliatory leverage and codified alongside allied exemptions.

Partnership. An emerging doctrine demanding stronger partners while penalising the strategic autonomy that strength confers.

The analysis identifies the main paradox of the relationship: India is strategically essential but, at the same time, politically disposable. The term 'disposable' has a specific meaning in this context: there is no domestic American interest that suffers when the partnership is downgraded. Strategic essentiality is reflected in the Pentagon's threat evaluations, while political disposability is reflected in the tariff lists, visa restrictions, and the silences in White House strategy. Both of these facts exist at the same time, and therefore Indian foreign policy must take them into account.

6.5 Counter-Arguments and Objections

Fieldwork interviews raise five objections to this structural thesis.

Volatile sentiment. Regarding the fluidity of sentiment, Paul Staniland points out that American opinion of India is soft and superficial and can just as easily turn in favour of India as when it turned against it. In response, the article differentiates between climate and structure: rhetoric and sentiment may change, whereas tariff rates, higher visa fees, and statutory amendments remain in place long after an administration departs.

Indian agency. One Washington scholar of South Asian security identifies a flaw in causality, arguing that India's own choices shape the relationship as much as American actions. A purely Washington-centric model risks writing Delhi out of its own story, an analytical boundary this monograph acknowledges in part. Indian decisions examined in Section II, on Russian crude, on procurement, on mediation and on representation in Washington, are treated there as causes rather than as background. However, the analysis of how they were received remains American-sourced.

Structural decline. Amitav Acharya argues that the American-dominated system has been coming apart over the past twenty years. Key reasons include the decline of American economic supremacy, the emergence of other centres of influence, and the exhaustion of the liberal internationalist consensus within the United States. According to this view, the executive branch did not cause the break but rather arrived at it on time, and another President could have produced the same trend differently. The evidence provided in the paper itself is ambiguous on this point: the documentary record supports Acharya's structural argument, while the volatility of the tariff sequence lends weight to the idea of agency. Whether one chooses to weigh these two factors remains a question of analytical judgement and not something that has been definitively established.

The Personalist exception. Andrew Grossman assesses the phenomenon as substantially personal: a successor, whether Vance or Rubio, might adopt similar rhetoric but would likely lack the populist authority to replicate the conduct. This, he feels, would produce a more conventional Republican administration. Answering Grossman's objection, the documentary evidence shows that statutory tariffs, protectionist floors, and a codified defence doctrine can persist without any individual figure.

6.6 Presidential Intent

Jeff Smith of the Heritage Foundation argues against much Indian commentary and against parts of the account given here. He does not regard the President as inherently hostile to India, though he accepts that many of the actions taken are perceived as hostile within India.[102]

Where many observers in India believe the President has pursued policies explicitly and intentionally designed to be anti-India, Smith's assessment is that if asked today the President would say the relationship is booming and his rapport with the Prime Minister excellent. Nothing in the record settles the question of intent, and this paper does not attempt to. What the record does establish is narrower and sufficient. The tariff rates and the punitive framing were the President's own, on the account of former officials who know how such decisions are made. The advisers who might have moderated them had been selected for their acquiescence to the presidential thinking. And the correction, when it came, came from the courts rather than from anyone in the White House.

Whether the President intended the outcome matters less, for a partner planning around him, than that the system produced it and could not stop it.

7 Implications for Two Capitals

The preceding analysis is explanatory. This final section outlines the assessments that emerge from the evidence for each capital.

7.1 For Washington

Strategic reliability depletes. Diplomatic reliability is a strategic asset that depletes with each coercive use. The tariff coercion produced a short-term agreement and, within five months, permanent structural responses from India: the India-EU trade and security architecture, accelerated European rearmament, and Canadian middle-power coordination. The February thaw recovered tactical ground, but failed to restore the faith partners previously placed on American predictability.

Crisis framing as a market. The May 2025 crisis exposed a procedural vulnerability. Sixty Pakistani-retained lobbying engagements against four Indian engagements meant that one belligerent overwhelmingly supplied the framing available to Washington in the opening days. The filings establish access, not outcomes; access is what determines which account of a crisis reaches decision-makers first. A great power whose crisis framing can be bought advertises that vulnerability to every future belligerent. The lesson foreign capitals drew is that the initial seventy-two hours of an American crisis response function as a competitive market for narrative dominance.

The Colby paradox. The hub-and-spoke doctrine developed by Elbridge Colby leads Washington into a structural paradox: it requires stronger partners yet at the same time suspects the autonomy that such strength would bring. The demands made, and the suspicion felt, cannot be combined, since each capability that a partner acquires under the first aspect becomes proof of possible disloyalty under the second. If this situation is pushed to its logical extreme, the doctrine forces Washington to face a choice which it has so far avoided: between partners who are capable and have independent judgement or partners who are dependent and lack capability. There is no other possible option.

7.2 For India

Discipline regarding vindication. India's strategic autonomy fared better than the treaty allies' reliance on American guarantees. Yet this outcome owed as much to historical circumstance as to foresight: Delhi held no treaty to be devalued, not because it anticipated 2025, but because it never trusted Washington sufficiently to sign one. Strategic distrust is merely a starting position. Converting it into a durable grand strategy requires a managed transition away from over-dependence on a single source. A defence inventory that remains 60 to 70% Russian in origin[103] limits how rapidly European or Israeli alternatives can substitute for Moscow or Washington. The transition also has a third leg beyond Moscow and Brussels: indigenous capability, where the pace of defence industrialisation at home will determine how much autonomy the diversification actually secures.

Reliability of the Legislature. Indian statecraft has long treated Congress as the relationship's stabilising anchor, and Section IV showed how slowly that anchor shifts. The Senate vote of August 2026 shows that it can also move against India, and that it can do so without deliberation. The chamber that could not assemble a majority to restrain tariffs on India assembled eighty-six votes to authorise them, twenty-one Democrats among the co-sponsors, in a bill whose subject was Russia. Congress remains worth cultivating through the NDAA, appropriations and the quiet machinery that outlasts presidencies. It can no longer be counted as insurance.

Talent pipeline vulnerabilities.

The $100,000 H-1B fee, the threatened dismantling of post-study work pathways, and legislative efforts to restrict practical training[104] convert the assumption of American absorption of Indian technical talent from a plan into a hope. Diversifying destinations and building domestic capacity to employ returning engineers are no longer long-term aspirations. They are immediate requirements. The strategic stake is larger than the individual careers involved. A prosperous and established diaspora is how communities become political constituencies over decades, and the constituency deficit identified in Section III is precisely what the pipeline was, over time, positioned to correct. Restricting the pipeline therefore removes the most plausible long-term remedy for India's absence of organised support in Washington.

Resourcing the Jaishankar doctrine.

A kinetic crisis with Pakistan is now subject to executive discretion, and discretion is shaped by whichever account of the crisis reaches Washington first and most often. In April and May 2025, Pakistani-retained representation outnumbered India's by an order of magnitude in recorded engagements. Indian planning must treat Washington during a crisis as a contested information environment; one Pakistan has worked continuously for decades. Correcting this requires a standing, professionally retained presence in Washington, engaged before crises rather than improvised during them. Retained representation shapes the environment; it does not substitute for access to the principal, which in 2025 Pakistan obtained by other means.

The Machinery, Not the Strategy: Adjusting the pitch to each administration was sound. The pitch had no organised access behind it, and the machinery needed to sustain a presidential relationship was never built.

The Disposition deficit.

Within a day of the Munir lunch, a former corps commander argued in the Indian Express that India need not worry, since the meeting fitted a long pattern of American engagement with Pakistan running from the Cold War pacts through the China opening to the post-2001 partnership. The newspaper's own editorial took a similar view.[105] The reading was historically literate and, on this paper's evidence, mistaken: what was novel in 2025 was not that Washington dealt with Rawalpindi, but that a President did so personally, in a manner the surrounding institutions no longer moderated. When the comparative lobbying filings were reported in January 2026, the governing party's information chief presented them as proof that Sindoor had shaken Pakistan and that domestic critics stood refuted. The Indian side of the same record was not addressed.[106] Eight months after the crisis, the disparity was still being read in Delhi as evidence about Pakistan rather than about India.

Washington Is Contested Ground: Treat Washington in any future crisis as ground where narratives compete. Representation cannot be improvised after escalation begins, because the first seventy two hours set the story.

Publicly, this presence should speak Washington's preferred language of burden-sharing and defence collaboration. In practice, diversification must proceed without apology. Pairing collaborative rhetoric with autonomous construction is sound statecraft. And it is the posture the American system rewards: it responds to those who organise, speaks warmly to those who flatter, and accommodates those who hold alternatives.

Commerce and Strategy Have Merged: When private business interests open political doors, commerce and strategy stop being separate files. Deals shape proximity, incentives and access, so strategy has to cover those channels.

The advice will sound familiar, since it is in substance the Jaishankar formulation criticised earlier: manage each presidency with appealing rhetoric while conceding nothing. The difference is resourcing. Words without organised access produced the presumption described earlier. The same words, backed by standing presence and an honest assessment of risk, amount to statecraft. The instinct was sound; the machinery beneath it was missing.

One further observation follows from this analysis. Where policy towards a nuclear-armed state may be shaped in part by the President's family commercial interests, partners can no longer treat the commercial and strategic domains as separate. Business channels form part of the strategic environment and must be monitored as such, with no expectation that Indian statecraft should imitate them.

The Four Enduring Features: Four developments outlast the rupture itself. Protectionist sentiment now runs across both parties. Political hostility to Indian migration has acquired its own domestic base. Washington's crisis reflex favours whoever reaches it fastest with a workable narrative, not whoever has the stronger case. And the emerging defence doctrine values partner capability while mistrusting partner independence. Taken together, these outweigh any single presidential decision in shaping the next decade of the relationship.

8 Conclusion: Three Scenarios and an Unresolved Question

This paper set out to explain how presidential agency and institutional structure interact in the making and unmaking of American partnerships. Five findings follow from the evidence.

First, agency started it and the existing structure supported it. The form that the rupture of 2025 took, the time at which it occurred and the setting in which it took place all came from one person. Yet the protective element underneath it, the immigration politics which led to the visa restrictions, and the crisis rationale that directed the handling of the Pakistani situation had already existed before him and will continue to exist after him.

Second, the American checks operated late, partially, and unevenly. The executive's own interagency machinery failed first, Congress constrained at the margins over multi-year cycles, and the courts corrected the instrument only after the commercial damage was done. For a partner, the interval of distortion is the exposure.

Third, the repricing has been documented. Strategy documents, tariff schedules, a command redesignation, a doctrine articulated in Delhi and Washington alike, and a bill passed by the Senate in August 2026 by eighty-six votes to eleven, have converted an executive disposition into an institutional position. India is strategically indispensable and politically expendable at the same time. The two formulations reached Delhi from different departments and in different words, which is why they describe a settled position rather than a passing one. Expendable here carries a precise meaning: no domestic American constituency bears a cost when the partnership is downgraded, and it is that second condition which governs day-to-day treatment.

Fourth, India's strategic autonomy was comparatively vindicated and remains comparatively costly. Treaty allies fared worse in the same period, yet autonomy continues to forfeit priority in American planning. That is the premium India pays on its insurance, and in 2025 the insurance paid out.

Fifth, Indian commentary in the months after the rupture understood it as a presidential aberration, and therefore as reversible. The evidence assembled here contradicts that inference. The protectionist doctrine is bipartisan, the immigration politics preceded this administration, the crisis reflex is institutional, and the doctrine now emerging carries the establishment's signature rather than the President's alone.

8.1 Three Trajectories

> **Three Futures, One Planning Requirement**: Three trajectories are plausible: repair of the partnership, deeper American retrenchment, and the growth of international networks that route around Washington. Indian planning should commit to none of them early. The protectionist and institutional features identified here are relevant in all three, which makes them a safer basis for planning than any forecast of which path Washington takes.

Against these findings, three trajectories are available to American policy, and Indian planning should be prepared for each rather than committed to any.

Alliance repair. A future administration moderates the tariff architecture and restores the rhetoric of partnership, acknowledging that the Indo-Pacific calculus requires New Delhi and accepts Indian autonomy as the price of a capable partner.

Deepened retrenchment. Spheres harden, burden-shifting becomes bipartisan doctrine, and Washington presses partners to surrender independence, thereby converting capable partners into dependents and eroding the network capability it seeks to draw upon.

Bypassing the United States. Neither side yields, and international networks continue migrating toward European, middle-power and minilateral architectures that function without reference to Washington.

The record of the past fourteen months contains indicators for each: the February 2026 trade understanding for the first, the Sanctioning Russia Act and the Colby doctrine for the second, and the India-EU agreements alongside Canadian middle-power coordination for the third. The distinction between the first two matters less than the Indian debate of 2025 assumed, because the enduring features survive under both. The protectionist floor moved for every trading partner and not for India alone. The India-specific findings are the absence of anyone in Washington positioned to contest its application, and the resulting size of the tariff penalty: 50% at its peak, among the highest levied anywhere, and now proposed in statute with India among the named targets.

Any repair available in the near term will therefore be tonal; the underlying transactional terms have shifted.

8.2 The Unresolved Question

The record closes in August 2026 with a central ambiguity unresolved. The February understanding was itself overtaken within a fortnight when the Supreme Court struck down the tariffs on which it rested. This left the underlying question open: whether the political terms of the relationship are settled, or are still only paused. The evidence available as this study closes is inconclusive.

What the evidence does permit is a judgement about method. A diversified network, accumulated leverage, indigenous capability, and a standing institutional presence in Washington serve Indian interests in all three trajectories, which is the definition of a sound hedge. What served under none was the assumption this paper began by examining, that the partnership rested on a foundation deeper than the will of whoever governs America. The testimony of the Biden administration's own Pentagon officials, set beside Colby's doctrine, dismantles that assumption from opposite ends of the American establishment: the friendliest administration found Indian engagement extractive, while the establishment's most systematic strategist reads Indian autonomy as disloyalty. Between those two assessments lies the ground on which the relationship must now be built. It is firmer than the rhetoric it replaces, because expectations calibrated accurately cannot be betrayed.

The case suggests that institutional ties are vulnerable to revaluation when they are not grounded in reciprocal interest and assured domestic support.

The task for planners in New Delhi, and across the wider partner system, is to read each new American document, statute and appointment against these three trajectories, and to identify which one is materialising — earlier than the treaty allies managed to do in the last cycle.

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