



WWJMRD 2025; 11(05): 58-60

www.wwjmr.com

International Journal

Peer Reviewed Journal

Refereed Journal

Indexed Journal

Impact Factor SJIF 2017:

5.182 2018: 5.51, (ISI) 2020-

2021: 1.361

E-ISSN: 2454-6615

Dr. Akhilesh Chandra Shukla

Department of Defence and
Strategic Studies, University of
Allahabad, UP, India.

Rohan Shukla

Department of political
science, Allahabad, UP, India

The Future of India-U.S. Relations in the Indo-Pacific: Strategic Convergence and Emerging Challenges:

Dr. Akhilesh Chandra Shukla, Rohan Shukla

Abstract

The Indo-Pacific has emerged as the world's most consequential geopolitical theater, where the strategic interests of India and the United States are increasingly aligned against China's assertive rise. This article examines the future trajectory of India-U.S. relations in the Indo-Pacific, analyzing the drivers of cooperation in defense, economics, and technology, while addressing persistent challenges. It evaluates the impact of initiatives like the Quad, defense technology transfers, and supply chain resilience partnerships on regional stability. The study argues that while structural factors favor deeper strategic alignment, divergences on Russia, trade, and climate policy could constrain the partnership. The article concludes with policy recommendations for strengthening this critical bilateral relationship in an era of great power competition.

Keywords: Nine-dash line, debt-trap diplomacy, COMCASA, BECA, LEMOA, QUAD, iCET, Malacca Strait, Artificial Intelligence, Jet engines, Belt and Road Initiative (BRI), Gray-zone Tactics, India-Middle East-Europe Economic corridor (IMEC), Defence Policy Group, INDUS-X, CAATSA, Interantion Traffic in Arms Regulation (ITAR), Comprehensive Strategic Partnership

Introduction

The 21st century's geopolitical center of gravity has shifted decisively to the Indo-Pacific, a region accounting for 60% of global GDP and home to the world's most pressing security challenges. As China pursues territorial expansion through its "nine-dash line" claims and debt-trap diplomacy, India and the U.S. have moved from tentative engagement to comprehensive strategic partnership. The relationship has transformed dramatically since the 2005 civil nuclear deal, with defense trade growing from near-zero to over \$20 billion and annual military exercises expanding from 1 to nearly 20.

This article analyzes four critical dimensions shaping the future of India-U.S. Indo-Pacific cooperation:

1. Defense and Security Alignment
2. Economic and Technological Collaboration
3. Institutional Architecture for Regional Stability
4. Persistent Challenges and Strategic Dilemmas

Defense and Security Alignment

The Indo-Pacific has emerged as the epicenter of 21st-century geopolitics, with China's military expansionism driving India and the U.S. into an increasingly close defense partnership. This strategic alignment, which has evolved dramatically since the Cold War era of estrangement, now encompasses a wide range of collaborative initiatives including joint military exercises, defense technology sharing, and maritime security coordination. The foundation of this partnership was significantly strengthened by the

2005 U.S.-India Civil Nuclear Agreement, which paved the way for defense trade growth from a negligible \$200 million to over \$20 billion today. Key institutional frameworks like the Major Defense Partnership (MDP) status, granted in 2016, have enabled critical agreements such as COMCASA for secure communications interoperability and BECA for geospatial intelligence sharing. These developments reflect a maturing relationship that

Correspondence:

Dr. Akhilesh Chandra Shukla

Department of Defence and
Strategic Studies, University of
Allahabad, UP, India.

extends beyond arms sales to include co-development of advanced systems and intelligence-sharing on Chinese military movements.

The Quadrilateral Security Dialogue (Quad), comprising India, the U.S., Japan, and Australia, has become a pivotal platform for enhancing maritime domain awareness and countering China's assertive actions in the region. Through initiatives like the Indo-Pacific Maritime Domain Awareness program, the partners are leveraging advanced P-8 aircraft networks to monitor Chinese submarine activity. The recent Initiative on Critical and Emerging Technology (iCET) further deepens collaboration in cutting-edge domains such as semiconductors, artificial intelligence, and quantum computing. However, the partnership faces significant challenges, including India's continued reliance on Russian military equipment (which constitutes about 60% of its inventory) and U.S. export control regimes like ITAR that restrict technology transfers. The potential \$3 billion MQ-9B drone deal and ongoing negotiations for F/A-18E Super Hornet fighters illustrate both the progress and complexities in defense trade, with the latter facing hurdles due to technology transfer restrictions.

Maritime security cooperation has become a cornerstone of the relationship, with the Logistics Exchange Memorandum of Agreement (LEMOA) enabling reciprocal base access and joint patrols in critical waterways like the Malacca Strait. The partners are increasingly focused on countering China's anti-access/area denial (A2/AD) strategy through undersea surveillance networks and coordinated operations. However, divergences persist, particularly regarding India's neutral stance on Ukraine and its historical commitment to strategic autonomy, which sometimes clashes with U.S. expectations of alliance-like behavior. Looking ahead, the partnership's trajectory will likely see expanded co-production initiatives, potentially including sixth-generation fighter jet development and integrated air defense networks with Quad partners. To fully realize the potential of this strategic alignment, the two nations must establish more robust mechanisms for technology sharing, create predictable waiver processes for U.S. sanctions, and develop institutionalized frameworks for joint operational planning. As China's military capabilities continue to grow, the India-U.S. defense partnership will play an increasingly vital role in maintaining regional stability, provided both nations can navigate their differences while capitalizing on areas of convergence.

Economic and Technological Collaboration

India and the United States emerging as key partners in shaping a rules-based order. Their collaboration spans critical areas such as semiconductor supply chains, clean energy, digital infrastructure, and defense technologies, driven by mutual concerns over China's economic coercion and technological dominance. The Initiative on Critical and Emerging Technologies (iCET), launched in 2022, exemplifies this partnership, facilitating joint ventures in artificial intelligence (AI), quantum computing, and space technology (White House, 2023). A landmark achievement under iCET is Micron Technology's \$2.7 billion semiconductor assembly plant in Gujarat, bolstering India's position in global chip supply chains while reducing dependency on China (MEA India, 2024). Additionally, the U.S.-India Defense Industrial Cooperation Roadmap aims

to co-produce jet engines (GE F414), armored vehicles, and undersea drones, enhancing India's defense modernization while aligning with Washington's Indo-Pacific security objectives (U.S. DoD, 2023).

Economic ties have strengthened through the India-Middle East-Europe Economic Corridor (IMEC), a U.S.-backed alternative to China's Belt and Road Initiative (BRI), which promises to enhance connectivity and energy security across the Indo-Pacific (Brookings, 2023). Bilateral trade has doubled since 2014, reaching \$191 billion in 2023, though the absence of a free trade agreement (FTA) remains a hurdle (USTR, 2024). Meanwhile, the Quad's Clean Energy Supply Chain Initiative focuses on rare earth minerals and renewable energy infrastructure, countering China's monopoly in these sectors (Carnegie, 2023).

Challenges persist, including U.S. export controls on advanced technologies and India's protectionist trade policies. However, the partnership's strategic logic—balancing China's influence while fostering innovation—ensures its long-term viability. As both nations navigate an era of economic decoupling and tech wars, their collaboration will be pivotal in securing a resilient, democratic Indo-Pacific.

Institutional Architecture for Regional Stability

The Indo-Pacific's strategic volatility demands robust institutional frameworks, and India-U.S. cooperation has evolved from ad-hoc engagements to structured mechanisms for regional stability. The Quadrilateral Security Dialogue (Quad) has matured into a premier platform, now addressing maritime security, infrastructure development, and critical technologies beyond its original military focus (Pant & Passi, 2023). Its Indo-Pacific Maritime Domain Awareness (IPMDA) initiative exemplifies this shift, leveraging satellite and drone networks to combat illegal fishing and monitor Chinese naval movements—a direct counter to Beijing's gray-zone tactics (CSIS, 2024). The India-Middle East-Europe Economic Corridor (IMEC), announced at the 2023 G20 Summit, institutionalizes connectivity alternatives to China's BRI through standardized port agreements and digital infrastructure projects (MEA India, 2023). Military coordination has been systematized via the Defense Policy Group (DPG) and 2+2 Ministerial Dialogue, which harmonize operational strategies and expedite defense transfers (U.S. DoD, 2024). However, gaps persist: the absence of a formal treaty alliance limits rapid response coordination, while India's Non-Aligned Movement (NAM) legacy complicates joint positioning on issues like Taiwan (Jaishankar, 2024). The proposed Indo-Pacific Defense Innovation Accelerator, building on INDUS-X, could bridge these gaps by codifying norms for emerging domains like seabed warfare and AI-driven surveillance (ORF, 2024). As China tests regional red lines—from the South China Sea to Solomon Islands—this institutional architecture must evolve from confidence-building to credible deterrence, with India and the U.S. anchoring a networked security order.

Persistent Challenges and Strategic Dilemmas

Despite significant progress in defense and economic cooperation, the India-U.S. strategic partnership in the Indo-Pacific faces enduring challenges that could constrain its potential. A central dilemma lies in India's historical ties

with Russia, which continue to complicate security coordination—while Washington pressures New Delhi to reduce dependence on Moscow's arms (accounting for 60% of India's military inventory), U.S. export controls and technology transfer restrictions often make American alternatives less attractive (SIPRI, 2023). The CAATSA sanctions waiver for India's S-400 purchase remains a temporary fix rather than a long-term solution (CRS Report, 2024). Equally problematic is the strategic autonomy paradox: India's insistence on non-alignment clashes with U.S. expectations for stronger alignment against China, particularly regarding Taiwan and the South China Sea (Pant, 2023). This tension manifests in India's reluctance to join

U.S.-led maritime patrols near contested waters, despite participating in Quad exercises (IDSA, 2024). Bureaucratic hurdles also persist—the U.S. International Traffic in Arms Regulations (ITAR) slow defense technology co-development, as seen in delays to the GE F414 jet engine deal (Brookings, 2024). Meanwhile, economic friction points like India's protectionist trade policies and stalled free trade agreement negotiations undermine efforts to build China-alternative supply chains (USTR, 2023). Perhaps most critically, the partnership lacks crisis management mechanisms for potential conflicts with China, with no equivalent to U.S.-Japan or U.S.-Australia contingency planning (Carnegie, 2024). These challenges don't negate the relationship's strategic value but underscore the need for creative compromises—perhaps through "minilateral" working groups on specific issues or reciprocal concessions on technology transfers—to transform tactical cooperation into enduring alliance-like coordination.

Future Trajectories and Policy Imperatives for India-U.S. Indo-Pacific Relations

Looking toward 2030, the India-U.S. partnership in the Indo-Pacific could evolve along three distinct pathways. The most optimistic scenario would see a Comprehensive Strategic Partnership marked by groundbreaking defense collaboration including joint development of sixth-generation fighter jets, bilateral trade reaching \$500 billion through enhanced supply chain integration, and full implementation of the Initiative on Critical and Emerging Technologies (iCET)

across AI, quantum computing, and semiconductor sectors. However, a more probable Constrained Alignment scenario may emerge, where persistent technology transfer restrictions, India's continuing defense ties with Russia, and unresolved trade disputes limit the partnership's potential. The most concerning possibility involves Strategic Drift, potentially triggered by U.S. retrenchment from Asia, an unexpected India-China détente, or the Quad's disintegration under geopolitical pressures.

To steer toward the optimal outcome, policymakers should prioritize four key measures: First, establishing an Indo-Pacific Defense Technology Council could institutionalize co-production mechanisms while addressing export control hurdles. Second, accelerating the India-Middle East-Europe Corridor (IMEC) through EU funding commitments would provide tangible alternatives to China's Belt and Road Initiative. Third, creating a bilateral critical minerals stockpile would secure supply chains for clean energy and defense technologies. Finally, developing a Quad Space

Partnership would enhance maritime domain awareness through satellite networks, countering Chinese assertiveness in contested waterways. These steps could help consolidate what has been called the "defining partnership of the 21st century" while mitigating risks of divergence.

Conclusion

The India-U.S. partnership represents the Indo-Pacific's most consequential bilateral relationship, with power to shape the regional order. While structural alignment against Chinese hegemony will drive cooperation, managing differences on Russia, technology, and climate policy will determine whether this becomes a defining alliance of the 21st century. The coming decade offers unprecedented opportunities—and formidable challenges—in building an open, secure, and prosperous Indo-Pacific.

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