

Current Issue

US Geopolitical Turmoil and India's Policy

Question 02

In the face of intensifying U.S. protectionism and its shifting geopolitical priorities in 2026, India's pursuit of 'strategic autonomy' faces a delicate balancing act. Critically analyse the challenges and opportunities for India's foreign policy in this context.

Question Understanding - Finding Information

- **Precise Syllabus Mapping:** Effect of policies and politics of developed and developing countries on India's interests, Indian diaspora.

(GS Paper – II)

- **Marks and words limit:**

- The marks-oriented approach to answering **(10-mark, 150-word)** questions in the question is to use **Bullet Points** (one idea per bullet point), **Brainstorming**, or a combination of both.
- The way to score good marks in questions worth **(15 marks. 250 words)** is to use the **Heading** and **Subheading** method while writing your answers.

- **Directive words:**

- Critically analyse → examine both challenges and opportunities, assess trade-offs, and present a balanced judgement (not a one-sided narrative).

- **Focal points of the questions:**

- U.S. protectionism (trade, technology, supply chains)
- Shifting geopolitical priorities of the U.S. (China focus, transactional alliances)
- India's doctrine of Strategic Autonomy
- Implications for India's foreign policy choices

Answer Writing Structure (Outline)

Introduction Paragraph

- Link strategic autonomy with current global churn
- Avoid textbook definitions; show relevance

Body Paragraph

A. Challenges to India's Strategic Autonomy

- **Economic & Trade Pressures**
 - U.S. tariff barriers, subsidy regimes, reshoring policies
 - Impact on: India's IT services, Pharma & manufacturing exports
 - Risk of trade conditionalities tied to market access
- **Analytical angle:** Strategic autonomy is constrained when economic dependence deepens.
- **Technology & Supply Chain Constraints**
 - **U.S. controls on:** Semiconductors, AI and dual-use technologies
 - Pressure to align with U.S.-led tech blocs
- Creates asymmetric dependence, limiting independent choices.
- **Geopolitical Alignment Dilemmas**
 - Expectations within Quad, Indo-Pacific strategy
 - Pressure to take clearer positions on: China, Russia-Ukraine conflict
- Risk of being seen as a "camp follower" rather than an autonomous actor.
- **Strategic Trust Deficit**
 - U.S.'s transactional approach to alliances
 - Sudden policy reversals undermine predictability
- Challenges long-term strategic planning for India.

B. Opportunities for India's Foreign Policy

- **Strategic Leverage as a Swing Power**
 - **India as:** A major Indo-Pacific stabilizer, An alternative manufacturing hub
- U.S. needs India as much as India needs the U.S.

- **Diversification of Partnerships**

- **Strengthening ties with:** EU, ASEAN, Middle East (I2U2), Africa & Global South

➤ Reduces over-dependence on any single power.

- **Norm-Shaping Role**

- **Leadership in:** G20, Global South discourse, Climate finance, digital public infrastructure

➤ Strategic autonomy enhanced through agenda-setting, not isolation.

- **Defence & Technology Gains**

- Selective cooperation without alliance commitments: Defence co-production, Critical tech partnerships

➤ Autonomy through capacity building, not neutrality.

C. Way Forward / Balancing Strategy

- Practice “multi-alignment with issue-based partnerships”
- Strengthen: Domestic manufacturing, R&D ecosystems
- Maintain principled pragmatism: Engage U.S. where interests converge, Retain freedom of choice elsewhere

Conclusion (max. 40 Words)

- Concluding Middle Path

Dos & Don'ts

- **Do for Maximum Marks**

- ✓ Use recent trends, not Cold War-era Non-Alignment alone.
- ✓ Use contemporary relevance (2026)
- ✓ Maintain balanced tone (neither pro-U.S. nor anti-U.S.)
- ✓ Link foreign policy choices with domestic capacity
- ✓ Use strategic vocabulary: leverage, autonomy, convergence, constraints
- ✓ Write in structured paragraphs with headings

- **Don't do these Common Mistakes**

- × Don't equate strategic autonomy with non-alignment mechanically
- × Don't give only descriptive U.S.–India relations history
- × Don't ignore economic & technological dimensions
- × Don't use emotionally charged or ideological language
- × Don't end without a way forward or judgement

Notes Oriented Content for Writing Answer

In 2026, the India-U.S. partnership has entered a 'transactional phase' marked by a sharp dichotomy: deepening institutional defence cooperation (e.g., the HAL-GE jet engine deal) alongside escalating economic friction. As Washington embraces an 'America First' protectionist agenda evidenced by 50% tariffs on Indian goods and a pivot toward bilateralism India's pursuit of Strategic Autonomy is being tested. This necessitates a delicate balancing act that ensures national interest while navigating a increasingly fragmented and inward-looking global order.

Geopolitical & Economic Context (2026)

- **Intensifying U.S. Protectionism:** High reciprocal tariffs and the linkage of trade to strategic concessions (e.g., pressuring India to alter ties with Russia/China).
- **Transactional Bilateralism:** A shift from value-based partnerships to interest-driven "quid pro quo" arrangements.
- **Weakened Multilateralism:** Erosion of the rules-based order, including a retreat from the WTO and a "downgrade" of the Quad's urgency.

Critical Challenges

- **Coercive Alignment:** U.S. pressure to cut Russian energy imports and limit defence ties.
- **Trade Vulnerabilities:** Higher tariffs on Indian steel, aluminum, and MSME exports, alongside stricter H-1B visa norms affecting the IT sector.
- **Strategic Marginalisation:** Exclusion from key U.S.-led tech initiatives like Pax Silica signals a weakening of the "China Plus One" narrative.

- **Erosion of Autonomy:** Accepting U.S. demands risks compromising independent decision-making and sets a precedent for policy concessions under pressure.

Strategic Opportunities

- **Market Diversification:** Accelerating Free Trade Agreements (FTAs) with the EU, UK, and ASEAN to reduce over-reliance on the U.S..
- **Global South Leadership:** Using India's 2026 BRICS Chairmanship to champion a non-Western but non-hostile global agenda.
- **Supply Chain Relocation:** Positioning India as a "trusted partner" for manufacturing hubs looking to de-risk from China.
- **Building Domestic Resilience:** Leveraging protectionist disruptions as a catalyst for Atmanirbhar Bharat in critical sectors like semiconductors and defense.

Synthesis: The 'Balanced' Foreign Policy Playbook

- **Multi-alignment:** Engaging multiple centers of power (U.S., Russia, EU, Global South) without entering rigid alliances.
- **Realism over Rhetoric:** Adopting a "mix-and-match" policy that prioritizes domestic economic security such as continuing Russian oil purchases to control inflation.
- **Strategic De-risking:** Deepening ties with middle-income markets and using platforms like the International Solar Alliance to maintain global leadership.

For India to navigate 2026 successfully, it must adopt a "mature, interest-based autonomy" that rejects rigid bloc politics in favour of issue-based partnerships. The path forward requires a calibrated blend of Atmanirbhar Bharat (self-reliance) and proactive economic diplomacy to transform these external disruptions into a catalyst for long-term structural resilience and global leadership.

Get your Answer Evaluated and Discuss with Mentor

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