



The India–U.S. Strategic Partnership: Navigating Multipolarity through Hedging or Alignment

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DOI: <https://doi.org/10.70333/ijeeks-04-08-017>

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Article Info:- Received : 19 July 2025

Accepted : 25 August 2025

Published : 30 August 2025

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India–U.S. relations have undergone a profound transformation since the Cold War, evolving from estrangement to a wide-ranging comprehensive strategic partnership. This paper examines whether India’s policy trajectory vis-à-vis the United States in today’s multipolar international system constitutes hedging or alignment. Building on the theoretical literature on hedging and alignment, and drawing on evidence across defense, technology, economic, and diplomatic domains, it argues that India practices a calibrated strategy of “multi-alignment with American tilt”—an issue-based alignment with the United States on shared interests in the Indo-Pacific and critical technologies, tempered by hedging to preserve strategic autonomy, diversify partners, and insure against uncertainty. The paper concludes with implications for theory and policy, and offers recommendations to sustain the positive-sum trajectory while managing friction points.

Keywords: India U.S. Strategic Partnership, Indo-Pacific Security, Strategic Autonomy, Defense Industrial Cooperation.



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1. Introduction

The post–Cold War period, and especially the last decade, has seen India and the United States converge on a set of mutual interests: maintaining a free, open, and inclusive Indo-Pacific; securing resilient supply chains; co-developing critical technologies; and enhancing defense interoperability. Simultaneously, India has retained longstanding ties with Russia, cultivated deep energy and economic relations with the Gulf, and engaged plurilateral groupings such as the

Quad (with the U.S., Japan, and Australia), BRICS, the G20, and I2U2. This complex behavior raises a central question of international relations (IR): does India’s current approach amount to *hedging*—pursuing contradictory policy bets to reduce risk—or *alignment*—a consistent security cooperation with one pole? This paper addresses that question by combining concepts from IR theory with an empirical assessment of recent milestones.

2. Concepts and Literature: Hedging vs Alignment

Alignment traditionally refers to a state's sustained security cooperation with a great power or coalition, often formalized through alliances; it entails military cooperation, strategic coordination, and some policy convergence. **Hedging** is a more nuanced strategy prevalent among secondary states in uncertain environments: it mixes limited security cooperation with major powers, economic engagement with potential rivals, and political signaling that keeps future options open. As **Kuik (2008, 2020) and Medeiros (2005, 2009)** note, hedging blends **insurance, engagement, and balancing** elements to avoid over-dependence and reduce vulnerability to abandonment or entrapment.

Applied to India, the literature emphasizes New Delhi's preferences for **strategic autonomy**, avoidance of treaty alliances, and **issue-based coalitions (Jaishankar, 2020)**. India's policies often overlap with U.S. objectives—especially toward a rules-based Indo-Pacific and critical tech—but diverge on Russia, Iran, and aspects of trade. Understanding whether India is hedging or aligning thus requires examining policy across arenas and over time.

3. Evolution of India-U.S. Ties Since the 2000s

The 2005 civil nuclear initiative and the 2008 Nuclear Suppliers Group (NSG) waiver catalyzed a strategic reset. Subsequent milestones consolidated defense and diplomatic cooperation: the 2016 Logistics Exchange Memorandum of Agreement (LEMOA), the 2018 Communications Compatibility and Security Agreement (COMCASA), and the 2020 Basic Exchange and Cooperation Agreement (BECA). Together, these “foundational agreements” facilitated reciprocal logistics access, secure communications, and geospatial information-sharing—essential for interoperability and advanced defense transfers.

Parallel developments reshaped the regional context. China's rapid power accretion and assertiveness, including border crises with India (**Doklam 2017; Galwan 2020**), catalyzed India's participation in the revived Quadrilateral Security Dialogue (Quad) from 2017 and the broadening of the **Malabar** exercises to include Australia in 2020. Diplomatic architecture

deepened via the annual **2+2 Ministerial Dialogue**, frequent leader-level summits, and a proliferation of working groups spanning defense innovation, space, and supply chains.

4. Drivers of Convergence

4.1 Strategic and Security Drivers

- **Indo-Pacific balance:** Shared interest in deterring coercion and ensuring maritime commons access has underpinned closer naval cooperation, information-sharing (BECA), and multilateral exercises (Malabar). India's Andaman & Nicobar geography and blue-water capabilities complement U.S. power projection and maritime domain awareness.
- **Interoperability and defense trade:** U.S.–India defense trade has risen markedly since 2008, with transfers ranging from transport aircraft (C-17, C-130J) and helicopters (MH-60R, Apache) to artillery and surveillance systems. Foundational pacts enable secure communications and logistics support that make combined operations and advanced sales feasible.

4.2 Technology, Industry, and Supply Chains

- **iCET and defense-industrial cooperation:** The **Initiative on Critical and Emerging Technologies (iCET)**, launched at the national security adviser level, set roadmaps for joint work on semiconductors, 5G/6G, AI, quantum, space, and a defense industrial agenda (including jet engines, munitions, and maritime systems). The 2023 State Visit outcomes announced **co-production of GE F-414 jet engines in India**, steps on **MQ-9B** unmanned systems, and expanded space collaboration. These moves support India's “Atmanirbhar” (self-reliance) goals while anchoring U.S. supply chains in a trusted democracy.
- **Resilient economic links:** The U.S. and India have become major partners in goods and services trade, high-skill migration, and digital services. Firms in semiconductors, electronics, and clean energy are investing in India, while India looks to the U.S. for capital, technology, and markets.

4.3 Normative and Systemic Factors

- **Pluralist democracies:** Values and diaspora ties provide political ballast, even as both sides acknowledge differences and domestic debates on rights and governance.
- **Multipolar insurance:** India welcomes a more multipolar order in which great-power competition does not force binary choices; the U.S., for its part, has adapted to partners that are not formal allies but provide substantial alignment on shared priorities.

5. Constraints, Divergences, and the Logic of Hedging

Despite remarkable convergence, friction points persist and explain India's enduring hedging logic:

- **Strategic Autonomy & Non-Alliance Preference.** India's foreign policy doctrine prioritizes independence of decision-making and avoids treaty alliances that could constrain options. New Delhi emphasizes "multi-alignment," engaging multiple centers of power simultaneously.
- **Russia Factor.** India relies on Russian legacy platforms, spares, and energy. Its cautious stance and abstentions in multilateral votes on the Ukraine war illustrate risk management: maintaining access to Russian hardware while expanding Western defense industrial cooperation.
- **Regional Balancing Beyond the U.S.** India invests in minilaterals (Quad, I2U2), trilaterals (India France-UAE; India-Japan-Australia), and deep partnerships with France, Israel, and the Gulf. This diversification reduces over-dependence and creates bargaining leverage.
- **Trade Frictions & Industrial Policy.** Tariff disputes, digital economy regulation, and local content/indigenization policies can generate frictions. Both sides have used dialogues to manage disputes, but differences in trade policy philosophies remain.
- **Issue-Specific Gaps.** On Iran sanctions, climate burden-sharing, or human rights rhetoric, India often signals distinct priorities. These are managed through

quiet diplomacy and compartmentalization rather than alliance discipline.

- In sum, India's behavior combines **alignment on strategic technology and maritime security** with **hedging on military procurement, energy, and diplomatic signaling**—a pattern consistent with sophisticated hedging frameworks.

6. Case Studies

6.1 Malabar 2020 and the Quad's Operationalization

Australia's return to **Exercise Malabar** in 2020, after a 13-year hiatus, symbolized the practical alignment among the Quad countries. Conducted in the Bay of Bengal and the Arabian Sea, Malabar demonstrated growing interoperability in anti-submarine warfare, carrier operations, and maritime domain awareness. For India, inviting Australia was a significant policy signal—shifting from caution to a more outward security role alongside the U.S. and partners—while still eschewing a formal alliance.

6.2 Foundational Defense Agreements (2016–2020)

LEMOA (2016) enabled reciprocal logistics access; **COMCASA (2018)** opened avenues for secure communications and high-end platforms; **BECA (2020)** institutionalized geospatial data-sharing. The sequence reflects a step-by-step trust-building approach: India preserved decision autonomy while enabling practical alignment with the U.S. military for operations and contingencies in the Indian Ocean and beyond.

6.3 iCET and Defense Industrial Co-Production

The **iCET** architecture created a whole-of-government mechanism to unlock co-production and co-development. The decision to co-produce **GE F-414** engines in India marks a generational leap in trust and technology transfer. It aligns U.S. objectives to diversify supply chains with India's push for indigenous manufacturing and export-capable aerospace platforms.

6.4 Ukraine War and Strategic Signaling

India's abstentions at the UN and its calls for diplomacy signal hedging: it preserves strategic equities with Russia, manages domestic defense needs, and avoids being entrapped in

great-power rivalries— while deepening cooperation with the United States in the Indo-Pacific and technology arenas.

7. Analytical Assessment: Hedging or Alignment?

This paper proposes that India’s policy is best described as “multi-alignment with American tilt.” The evidence indicates:

- **Alignment** in sectors central to the future balance of power—maritime security in the Indo-Pacific, defense interoperability, critical technologies (semiconductors, AI, space), and supply-chain security. The institutionalization through 2+2 dialogues, foundational agreements, and iCET indicates sustained, cumulative cooperation.
- **Hedging** in domains where India faces high switching costs or seeks diversification—legacy Russian systems, energy security, Middle East partnerships, and aspects of trade. New Delhi retains bargaining space and “insurance” against uncertainties in U.S. policy or regional shocks.

In theory terms, India’s strategy maps onto Kuik’s hedging taxonomy: **binding** and **balancing** behaviors toward China (via Quad, Malabar), **engagement** with multiple poles (U.S., Europe, Russia, Gulf), and **insurance** through autonomy. The “American tilt” arises from convergent threat perceptions, technology synergies, and the density of institutional mechanisms created since 2016.

8. Policy Implications and Recommendations For India

8.1. Deepen Defense Industrial Integration while Managing Legacy Dependencies:

Accelerate timelines for engine, munitions, and maritime systems co-production with the U.S. and allies; use targeted diversification and stockpiling to mitigate reliance on Russian spares.

8.2. Invest in Maritime Domain Awareness (MDA):

Exploit BECA-enabled geospatial sharing and Quad information fusion to enhance deterrence in the Indian Ocean; expand agreements with littoral partners.

8.3. Use Plurilateralism to Preserve Autonomy:

Leverage Quad, I2U2, and Europe-India

frameworks to shape standards in critical tech without binding treaty constraints.

8.4. Trade Facilitation for Supply-Chain Leadership:

Streamline customs, data flows, and testing/ certification regimes to lock in friend-shoring gains; align selectively with trusted-partner standards to attract higher-end manufacturing.

For the United States

8.5. Sustain High-End Technology Transfer.

Operationalize engine and unmanned systems projects; prioritize export controls and licensing reforms that enable trusted co-development while protecting IP.

8.6. Make the Indo-Pacific the Anchor.

Expand combined exercises, undersea awareness, and logistics pre-positioning that leverage LEMOA/COMCASA/BECA; support India’s maritime capacity building for the wider Indian Ocean Region.

8.7. Manage Differences Quietly.

Use structured dialogues to navigate Russia-related issues, digital trade, and rights concerns without disrupting strategic cooperation.

8.8. Economic Statecraft.

Conclude targeted sectoral arrangements on clean energy, critical minerals, and semiconductors; offer predictable market access in exchange for supply-chain commitments.

9. Conclusion

India’s approach in the era of multipolarity transcends a binary choice between hedging and alignment. New Delhi is aligning with the United States where it most matters for long-term power and prosperity—sea control, technology, and defense-industrial capacity—while hedging in legacy and energy domains to maintain flexibility and autonomy. For policymakers and scholars, the India–U.S. relationship exemplifies how major non-allied partners can generate alliance-like external effects through layered institutionalization, co-production, and plurilateral networking. The task ahead is to

convert this momentum into durable capability gains and rule-setting influence without forcing either side into rigid alliance templates that neither seeks.

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Cite this article as: Rajni Tripathi., (2025). The India–U.S. Strategic Partnership: Navigating Multipolarity through Hedging or Alignment. *International Journal of Emerging Knowledge Studies*. 4(8), pp.1298 – 1302.
<https://doi.org/10.70333/ijeks-04-08-017>