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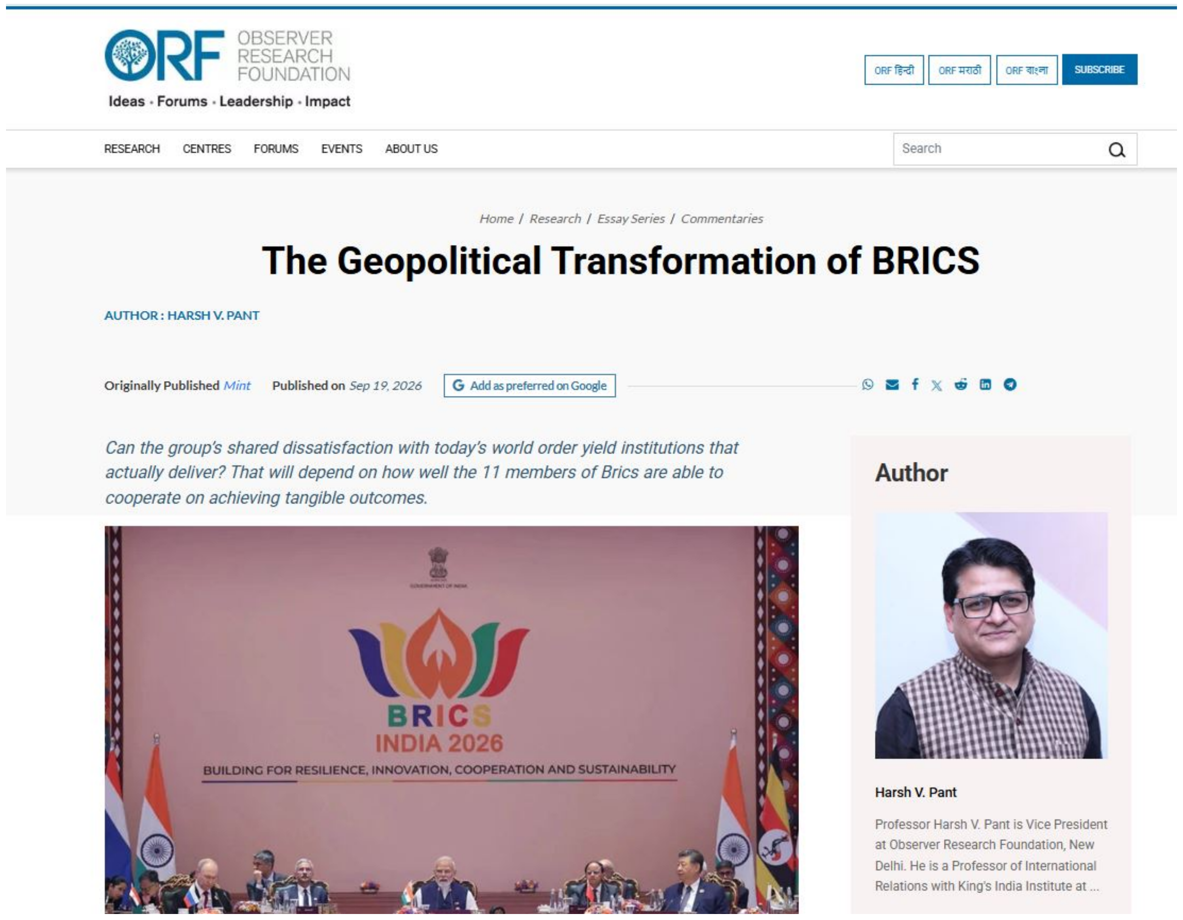
India will de-risk, not decouple, from US and China : Sanjaya Baru

The Geopolitical Transformation of BRICS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The Geopolitical Transformation of BRICS

AUTHOR : HARSH V. PANT

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Can the group's shared dissatisfaction with today's world order yield institutions that actually deliver? That will depend on how well the 11 members of Brics are able to cooperate on achieving tangible outcomes.

Author

Harsh V. Pant

Professor Harsh V. Pant is Vice President at Observer Research Foundation, New Delhi. He is a Professor of International Relations with King's India Institute at ...

Context

BRICS has eleven members and more geopolitical weight than ever, but the question is whether a group this large and varied can agree on anything worth calling an outcome.

Facts

- **New Delhi Summit declaration :** called for restraint and dialogue while avoiding direct confrontation with Washington or Israel.

- **BRICS does not work as a geopolitical bloc :** BRICS foreign ministers could not agree on a joint statement during the 2026 Iran conflict.

- **New Delhi Declaration covered :** conflicts, terrorism, UN reform and multipolarity, health, food and energy security, technology, AI, digital public infrastructure, critical minerals, supply chains and financial cooperation.

Analytical Crux

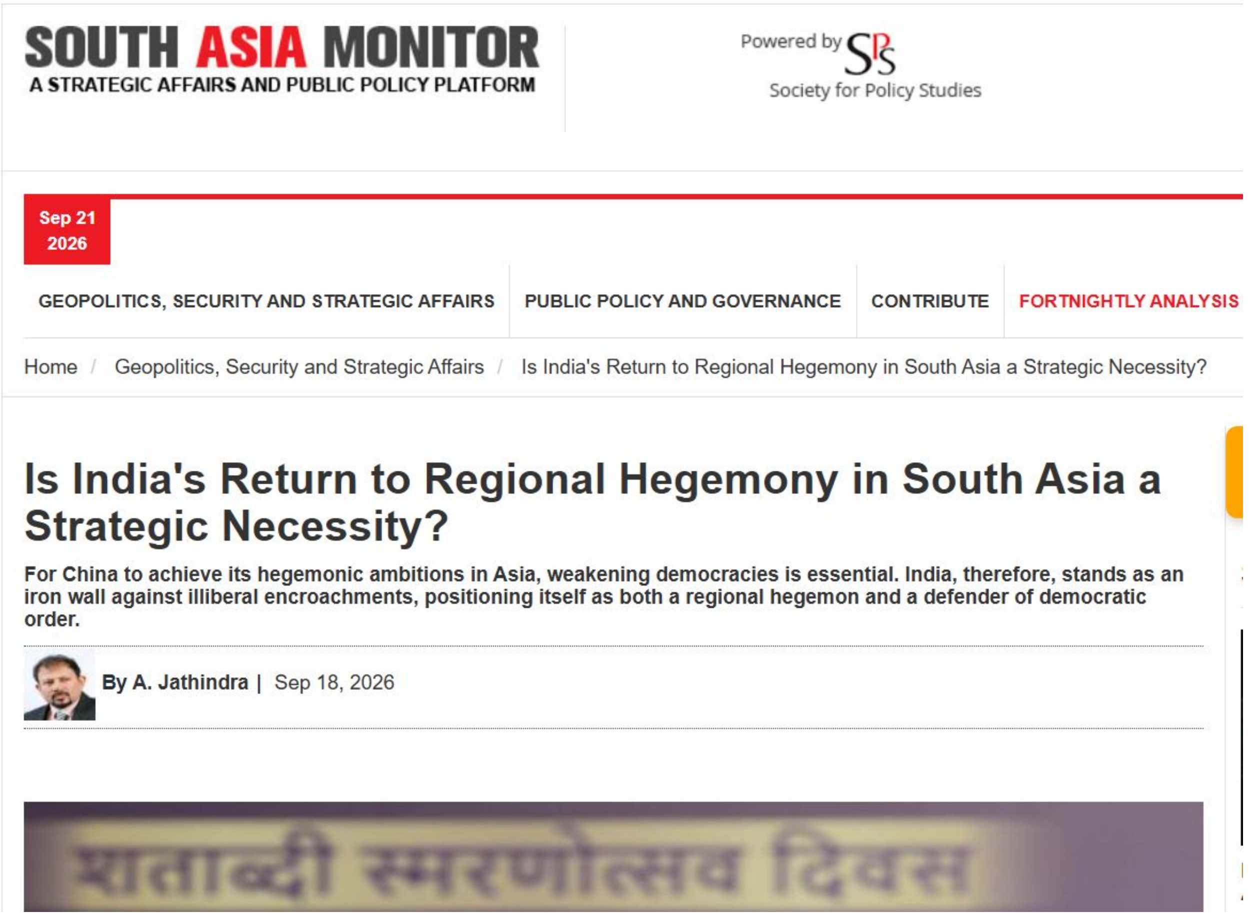
BRICS is not becoming an anti-Western bloc. It is becoming a bargaining platform for states that want a larger say without being asked to pick a side. Every new member adds weight to the group and subtracts from its capacity to agree, which is why the foreign ministers could not produce a joint statement during the 2026 Iran conflict. India's 2026 chairmanship is to keep geopolitics on the agenda, but development as the engine. BRICS contains two futures at once: a revisionist one that suits China and Russia, and a reformist, multi-aligned one that suits India and Brazil. The New Development Bank is small and de-dollarisation is slow, so its credibility rests on institutions that work and not on the vocabulary of multipolarity.

Verbatim Quotes

"New Delhi does not see strategic autonomy as choosing between the West and the rest. It sees value in maintaining multiple partnerships simultaneously."

– Harsh V. Pant

India's Hegemonic Return: A Strategic Necessity?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Home / Geopolitics, Security and Strategic Affairs / Is India's Return to Regional Hegemony in South Asia a Strategic Necessity?

Is India's Return to Regional Hegemony in South Asia a Strategic Necessity?

For China to achieve its hegemonic ambitions in Asia, weakening democracies is essential. India, therefore, stands as an iron wall against illiberal encroachments, positioning itself as both a regional hegemon and a defender of democratic order.

By A. Jathindra | Sep 18, 2026

Context

With the United States pulling back into its own hemisphere, India has no realistic option left but to act as the dominant power in South Asia, and Operation Sindoor was the moment it began doing so openly.

Facts

- **Trump reaffirmed the Monroe Doctrine :** called a "new Trump Corollary", the American people "will always control their own destiny in our hemisphere".

- **On 7 August 2026 :** Saudi Arabia, Turkey and Pakistan signed a Joint Defence Agreement pledging collective defence – an attack on one to be treated as an attack on all three.

- **Operation Sindoor :** presented as ending Pakistan's long-standing "nuclear blackmail".

Analytical Crux

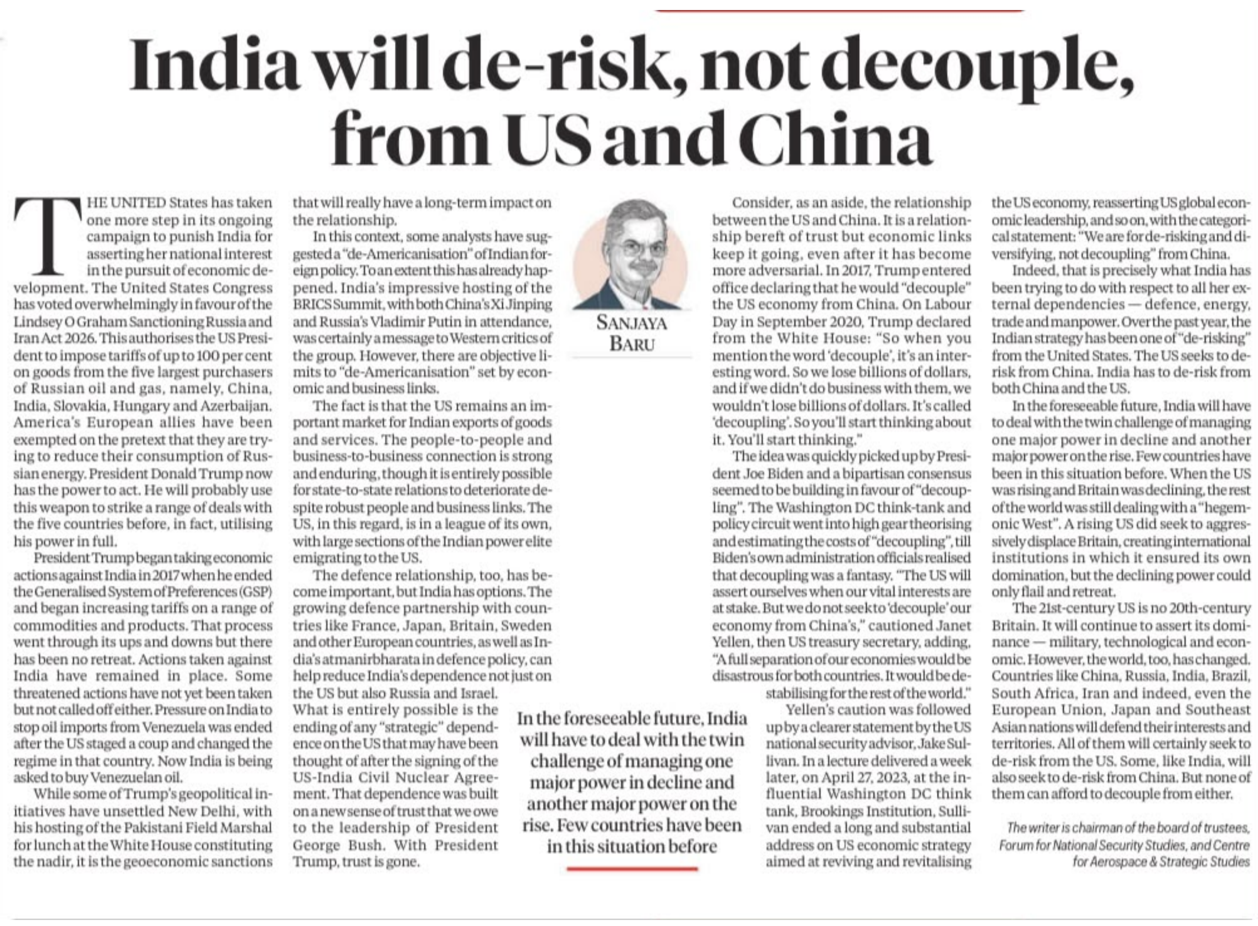
India's regional dominance is no longer a choice it can postpone, because when the global order has no manager the neighbourhood gets managed by whoever is willing to act in it. Operation Sindoor is read not as one strike but as a signal about what India will do from now. Every assertion of Indian strength pushes Pakistan into external balancing, with China and through the defence agreement with Turkey and Saudi Arabia. Hegemony in South Asia has historically produced resentment rather than followership, which is why the neighbours keep reaching for outside partners in the first place.

Verbatim Quotes

"India, therefore, stands as an iron wall against illiberal encroachments, positioning itself as both a regional hegemon and a defender of democratic order."

– A. Jathindra

India will de-risk, not decouple, from US and China



India will de-risk, not decouple, from US and China

SANJAYA BARU

THE UNITED States has taken one more step in its ongoing campaign to punish India for asserting her national interest in the pursuit of economic development. The United States Congress has voted overwhelmingly in favour of the Lindsey O Graham Sanctioning Russia and Iran Act 2026. This authorises the US President to impose tariffs of up to 100 per cent on goods from the five largest purchasers of Russian oil and gas, namely, China, India, Slovakia, Hungary and Azerbaijan. America's European allies have been exempted on the pretext that they are trying to reduce their consumption of Russian energy. President Donald Trump now has the power to act. He will probably use this weapon to strike a range of deals with the five countries before, in fact, utilising his power in full.

President Trump began taking economic actions against India in 2017 when he ended the Generalised System of Preferences (GSP) and began increasing tariffs on a range of commodities and products. That process went through its ups and downs but there has been no retreat. Actions taken against India have remained in place. Some threatened actions have not yet been taken but not called off either. Pressure on India to stop oil imports from Venezuela was ended after the US staged a coup and changed the regime in that country. Now India is being asked to buy Venezuelan oil.

While some of Trump's geopolitical initiatives have unsettled New Delhi, with his hosting of the Pakistani Field Marshal for lunch at the White House constituting the nadir, it is the geoeconomic sanctions that will really have a long-term impact on the relationship.

In this context, some analysts have suggested a "de-Americanisation" of Indian foreign policy. To an extent this has already happened. India's impressive hosting of the BRICS Summit, with both China's Xi Jinping and Russia's Vladimir Putin in attendance, was certainly a message to Western critics of the group. However, there are objective limits to "de-Americanisation" set by economic and business links.

The fact is that the US remains an important market for Indian exports of goods and services. The people-to-people and business-to-business connection is strong and enduring, though it is entirely possible for state-to-state relations to deteriorate despite robust people and business links. The US, in this regard, is in a league of its own, with large sections of the Indian power elite emigrating to the US.

The defence relationship, too, has become important, but India has options. The growing defence partnership with countries like France, Japan, Britain, Sweden and other European countries, as well as India's atmanirbharata in defence policy, can help reduce India's dependence not just on the US but also Russia and Israel. What is entirely possible is the ending of any "strategic" dependence on the US that may have been thought of after the signing of the US-India Civil Nuclear Agreement. That dependence was built on a new sense of trust that we owe to the leadership of President George Bush. With President Trump, trust is gone.

In the foreseeable future, India will have to deal with the twin challenge of managing one major power in decline and another major power on the rise. Few countries have been in this situation before

Consider, as an aside, the relationship between the US and China. It is a relationship bereft of trust but economic links keep it going, even after it has become more adversarial. In 2017, Trump entered office declaring that he would "decouple" the US economy from China. On Labour Day in September 2020, Trump declared from the White House: "So when you mention the word 'decouple', it's an interesting word. So we lose billions of dollars, and if we didn't do business with them, we wouldn't lose billions of dollars. It's called 'decoupling'. So you'll start thinking about it. You'll start thinking."

The idea was quickly picked up by President Joe Biden and a bipartisan consensus seemed to be building in favour of "decoupling". The Washington DC think-tank and policy circuit went into high gear theorising and estimating the costs of "decoupling", till Biden's own administration officials realised that decoupling was a fantasy. "The US will assert ourselves when our vital interests are at stake. But we do not seek to 'decouple' our economy from China's," cautioned Janet Yellen, then US treasury secretary, adding, "A full separation of our economies would be disastrous for both countries. It would be destabilising for the rest of the world."

Yellen's caution was followed up by a clearer statement by the US national security advisor, Jake Sullivan. In a lecture delivered a week later, on April 27, 2023, at the influential Washington DC think tank, Brookings Institution, Sullivan ended a long and substantial address on US economic strategy aimed at reviving and revitalising the US economy, reasserting US global economic leadership, and so on, with the categorical statement: "We are for de-risking and diversifying, not decoupling" from China.

Indeed, that is precisely what India has been trying to do with respect to all her external dependencies — defence, energy, trade and manpower. Over the past year, the Indian strategy has been one of "de-risking" from the United States. The US seeks to de-risk from China. India has to de-risk from both China and the US.

In the foreseeable future, India will have to deal with the twin challenge of managing one major power in decline and another major power on the rise. Few countries have been in this situation before. When the US was rising and Britain was declining, the rest of the world was still dealing with a "hegemonic West". A rising US did seek to aggressively displace Britain, creating international institutions in which it ensured its own domination, but the declining power could only flail and retreat.

The 21st-century US is no 20th-century Britain. It will continue to assert its dominance — military, technological and economic. However, the world, too, has changed. Countries like China, Russia, India, Brazil, South Africa, Iran and indeed, even the European Union, Japan and Southeast Asian nations will defend their interests and territories. All of them will certainly seek to de-risk from the US. Some, like India, will also seek to de-risk from China. But none of them can afford to decouple from either.

The writer is chairman of the board of trustees, Forum for National Security Studies, and Centre for Aerospace & Strategic Studies

Context

Washington has given itself the power to put tariffs of up to 100 per cent on big buyers of Russian oil, and India's response should be to reduce exposure but not cut the cord.

Facts

- **Trump ended :** India's Generalised System of Preferences benefits and raised tariffs on a range of Indian goods.
- **India's defence partnerships :** with France, Japan, Britain, Sweden and other European countries, alongside atmanirbharata, can reduce dependence on the United States, Russia and Israel.
- **India de-risking across four dependencies at once :** defence, energy, trade and manpower.

Analytical Crux

De-risking and decoupling are not two words for the same thing. Decoupling cuts the link, whereas de-risking keeps the link but lowers what you stand to lose if it breaks. Washington learned this against China between 2020 and 2023, when decoupling went from a presidential slogan to a position that both Yellen and Sullivan publicly abandoned. India is applying that same logic to Washington itself. What makes India's position unusual is that it has to de-risk in two directions at once, from a power on the way down and a power on the way up. The American market, the business links and an Indian elite that has emigrated there mean state-to-state relations can sour a long way without the underlying connection breaking. What has changed, then, is the quality of the relationship and not its direction. The strategic trust built after the civil nuclear agreement has gone, but the relationship has not.

Verbatim Quotes

"In the foreseeable future, India will have to deal with the twin challenge of managing one major power in decline and another major power on the rise. Few countries have been in this situation before."

– Sanjaya Baru

UPSC LINK

- GS Paper II, 2026: “BRICS acts as a powerful counterweight in global governance, actively amplifying the voice and influence of the Global South.” Explain the role of BRICS in projecting itself as an alternative to other groupings.

- PSIR Paper II, 2026: Does power transition theory reflect the dynamics of US-China relations?

- PSIR Paper II, 2026: Accelerating of Chinese influence across South Asia is fundamentally reshaping the region’s geopolitical landscape. This is a big foreign policy challenge for India. Analyse.

- PSIR Paper II, 2025: India continues to invoke its time-tested policy of strategic autonomy vis-à-vis both the United States of America and Russia by rejecting US’ offer of mediation on Kashmir issue and by refusing to criticize Russia in its ongoing war against Ukraine. Comment.

- PSIR Paper II, 2024: Discuss the potential role that India could play as the leader of the Global South in realising the goal of establishing a new international economic order in the 21st century.

- GS Paper II, 2024: “The West is fostering India as an alternative to reduce dependence on China’s supply chain and as a strategic ally to counter China’s political and economic dominance.” Explain this statement with examples.

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