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OPINION

Trump's Second Term: Recalibrating US Policy Towards South Asia with a Focus on India

Imran Khurshid*



The return of Donald Trump to the White House in 2025 marks a significant moment in US foreign policy, particularly with respect to South Asia—a region experiencing intricate geopolitical realignments. During his first term (2016-20), Trump pursued a realist and transactional foreign policy, characterized by a hardline posture toward Pakistan, an unprecedented strategic embrace with India, and selective engagement with other regional actors, including Afghanistan, Sri Lanka, and Bangladesh. His administration's Indo-Pacific Strategy signalled a shift in the US strategic perception of India—from a traditionally South Asia-centric lens to a broader, maritime-focused strategic partnership. Trump's policies

emphasized security cooperation, defense-industrial collaboration, and the maintenance of geostrategic equilibrium, particularly in response to China's growing regional assertiveness. As his second term commences, these trends appear not only to persist but to intensify, as evidenced by renewed initiatives such as COMPACT and TRUST, which underscore the deepening institutionalization of India-US strategic ties. This paper examines the evolution of Trump's South Asia policy, with particular attention to his recalibrated approach toward Pakistan, the waning strategic centrality of Afghanistan, emerging strategic alignments with Sri Lanka and Bangladesh, and the comprehensive elevation of India as a cornerstone of Washington's Indo-Pacific and South Asia strategy.

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Trump's Approach to Pakistan

During his first term, President Trump adopted a markedly tougher stance toward Pakistan, exemplified by the suspension of military assistance. He repeatedly asserted that the "U.S. has foolishly given Pakistan more than 33 billion dollars in aid over the last 15 years, and they have given us nothing but lies and deceit, thinking of our leaders as fools. They give safe haven to the terrorists we hunt in Afghanistan." His administration exerted significant pressure on Pakistan for its alleged support of terrorist groups and the provision of safe havens to such actors. Notably, Trump refrained from criticizing India when it conducted multiple airstrikes across the Line of Control (LoC) and abrogated Article 370 of the Indian Constitution in 2019—actions that aligned with New Delhi's national security imperatives. Furthermore, his administration deliberately avoided engagement with India's domestic affairs, as evidenced by his state visit to India in 2020, which coincided with the Delhi riots. That the Trump chose not to comment on the unrest signalled a pragmatic approach and a long-term commitment to strengthening US-India relations.¹

In his second term, Trump's policy toward Pakistan is expected to retain

its transactional and security-centric character. Following the US withdrawal from Afghanistan in 2021, Pakistan's strategic utility for Washington has diminished considerably; nonetheless, the US remains wary of a complete state failure in Pakistan, recognizing the potential for regional destabilisation. The presence of Pakistan's nuclear arsenal and concerns about its potential vulnerability to extremist elements underscore the necessity of maintaining a degree of strategic engagement. Recent developments point to ongoing, albeit limited, counterterrorism cooperation between the Pentagon and Rawalpindi, as illustrated by Pakistan's arrest of an ISIS commander implicated in the 2021 Kabul airport attack, reportedly based on CIA intelligence.

In February 2025, the Trump administration approved \$397 million for the deployment of a US Technical Security Team to support Pakistan's F-16 fleet. This assistance is contingent upon strict end-use monitoring protocols, aimed at ensuring the aircraft are employed solely for counterterrorism operations—not against India. However, this engagement should not be interpreted as a revival of the robust military cooperation witnessed during the US-led war in Afghanistan. Beyond security, there

are emerging signs of modest economic interaction. Washington has expressed interest in Pakistan's mineral sector, while Islamabad is exploring the possibility of importing crude oil from the US as a means of addressing trade imbalances, particularly in light of new American tariffs. Nevertheless, such engagements are expected to remain limited in scope, governed by Trump's inherently transactional approach and broader geostrategic calculations.

Despite these developments, Trump is unlikely to adopt a conciliatory posture toward Pakistan, given its role in harbouring the Taliban and fostering extremism. Moreover, in light of Trump's transactional diplomatic style and the intensifying US-China geostrategic-cum-economic rivalry, it is conceivable that he may exert pressure on Pakistan to reduce its alignment with Beijing, particularly concerning the China-Pakistan Economic Corridor (CPEC) and related infrastructure initiatives.²

Afghanistan: A Low sPriority with high stakes

Afghanistan is anticipated to remain a relatively low priority for President Trump during his second term. In his first term, he brokered the US-Taliban peace agreement, which ultimately facilitated the withdrawal of American forces from

the country. While Kabul is unlikely to feature prominently in Trump's foreign policy agenda due to the absence of immediate economic benefits, its geopolitical relevance—particularly with regard to its substantial rare earth mineral reserves and its strategic location—may nonetheless inform his administration's posture. In early 2025, a high-level US delegation, led by former envoy Zalmay Khalilzad, visited Kabul and successfully negotiated the release of an American national through direct engagement with Taliban officials. Concurrently, speculation has intensified regarding the potential reopening of the American embassy in Kabul, as well as covert arrangements permitting US access to the Bagram Air Base. Such developments could provide Washington with critical strategic advantages, enabling intelligence surveillance and extending operational capabilities across the broader region—particularly in exerting pressure on Iran—in exchange for selective concessions to the Taliban.

Amid these changing regional dynamics, India must adopt a more assertive and forward-looking policy. In early 2025, India intensified its diplomatic outreach when Foreign Secretary Vikram Misri met Afghanistan's Acting Foreign Minister Amir Khan Muttaqi in Dubai to explore deeper political and

economic cooperation, including trade via Iran's Chabahar Port. However, India's cautious and limited engagement risks creating a strategic vacuum that other regional actors may exploit, thereby undermining its long-term interests. In particular, proactive Indian involvement is essential to counterbalance China's growing footprint in Afghanistan, which is advancing through Belt and Road Initiative (BRI)-linked dual-use infrastructure projects, economic investments, and large-scale infrastructure projects that could entrench Beijing's influence in the region.³

Engagement with Sri Lanka and Bangladesh

Given Sri Lanka's geostrategic location in the Indian Ocean—particularly its proximity to critical maritime trade routes and strategic chokepoints—and considering China's deepening strategic foothold in the region, exemplified by the 99-year lease of Hambantota Port, Sri Lanka assumes heightened importance for US interests within its broader Indo-Pacific regional framework. Under the Trump administration 2.0, engagement with Sri Lanka is expected to persist as an integral part of the US Indo-Pacific security framework, as Washington seeks to counterbalance Beijing's expanding regional influence.⁴

With respect to Bangladesh, Trump is unlikely to extend qualitative support to the Yunus-led transitional government, diverging from the approach taken by the Biden administration, which not only endorsed but allegedly facilitated the political transition in Dhaka—arguably at the expense of long-term U.S. geostrategic interests in South Asia. The Biden administration's policy in this context appeared misaligned with the overarching objectives of the US Indo-Pacific strategy. By backing Yunus, the Biden's administration inadvertently drove Bangladesh closer to China, strained ties with India by neglecting its regional security concerns, and undermined the strategic imperative of containing Beijing's influence. In contrast, Trump is expected to avoid such strategic miscalculations, ensuring that US policy in South Asia remains closely aligned with its broader geostrategic imperatives in the Indo-Pacific.⁵

Engaging India

During his first term, President Trump significantly deepened the US-India strategic partnership by finalizing all remaining foundational defense agreements. These included the signing of the Communications Compatibility and Security Agreement (COMCASA) in 2018, the extension of the General Security of Military Information Agreement

(GSOMIA), the conclusion of the Industrial Security Annex in 2019, and the Basic Exchange and Cooperation Agreement (BECA) in 2020. In addition, the Trump administration in 2018 conferred "Strategic Trade Authorization-1" (STA-1) status upon India, thereby easing export controls for high-technology goods and granting India the same level of access as key U.S. allies such as Australia, Japan, and South Korea.

It was also under Trump's leadership in 2018 that the "2+2" ministerial dialogue was institutionalized, bringing together the U.S. Secretaries of Defense and State with their Indian counterparts in an annual forum to enhance bilateral security and defense cooperation. Furthermore, his administration formally adopted the term "Indo-Pacific" in the 2017 US National Security Strategy, replacing the previous "Asia-Pacific" nomenclature, a shift which signified an expanded geostrategic role for India within the region. It was in this strategy that China was, for the first time, explicitly designated as a "strategic competitor," a position further reinforced in the 2018 National Defense Strategy.

This Indo-Pacific strategic framework advanced under Trump reflects an integrated balance-of-

power approach to the whole of this region, extending from the west Coast of America to the east coast of Africa, aimed at counterbalancing China's growing strategic dominance. Not only did this shift reorient US strategic thinking to view India beyond South Asia-centric lens as a pivotal actor in the broader Indo-Pacific, it also brought effective de-hyphenation in Washington's approach towards New Delhi, which previously impacted by its equation with Pakistan. For India, this strategic shift proved advantageous, allowing it to recalibrate its national security outlook and embrace a more expansive, maritime-oriented perspective. The framework enabled India to gradually move beyond a traditionally land-centric strategic posture to a greater maritime oriented perspective by facilitating a greater engagement with regional actors in pursuit of its broader security objectives.

Moreover, during the Galwan border crisis in 2020, the Trump administration offered unequivocal support to India, providing both diplomatic backing and material assistance. Washington expedited the provision of critical intelligence, advanced surveillance platforms such as the MQ-9B drones, and specialized cold-weather gear. This episode underlined the Trump administration's view of India as a

vital strategic partner in balancing China's influence in the Indo-Pacific region.

Relations under Trump 2.0

President Trump's second term is poised to witness an even deeper consolidation of US-India strategic cooperation in South Asia, extending beyond the traditional confines to the broader Indo-Pacific. During Prime Minister Modi's February 2025 visit to the United States, a joint press conference between the two leaders underscored their growing strategic alignment in the South Asian region. In response to a question regarding Bangladesh and alleged US deep-state involvement, President Trump remarked, "I will leave Bangladesh to PM Modi, and he has been working on it for quite some time," thereby signalling a broader convergence of interests and enhanced policy coordination between the two countries. In contrast to the Biden administration's inconsistent and at times contradictory approach to the region, Trump's policy appears more strategically coherent, consistent, and forward-looking—providing India with a wider array of strategic choices and greater autonomy in regional decision-making.⁶

The Trump administration demonstrated its commitment to multilateral engagement and to the India-US partnership by convening

its first Quadrilateral Security Dialogue (QUAD) meeting merely a day after the presidential inauguration. This swift move reaffirmed the centrality of India in the Trump administration's regional strategy. Further solidifying US support for India's leadership role in the Indian Ocean Region (IOR), the February 13, 2025, joint statement declared, "the US appreciates India's role as a developmental, humanitarian assistance, and net security provider in the Indian Ocean Region."⁷

While some observers speculated whether Trump's second term would maintain momentum in advancing strategic technology and defense industrial cooperation with India, recent initiatives strongly indicate sustained prioritization in this domain. The launch of the US-India COMPACT (Catalysing Opportunities for Military Partnership, Accelerated Commerce & Technology) initiative signifies a continued emphasis on defense industrial collaboration and transformative engagement across key sectors.

Complementing this, the announcement of the TRUST initiative (Transforming the Relationship Utilizing Strategic Technology) marks a critical development in bilateral ties. This

initiative aims to foster robust government-to-government, academia and private sector collaborations, targeting the development and deployment of critical and emerging technologies in fields, such as defense, artificial intelligence, semiconductors, quantum, biotechnology, energy and space. It also emphasizes the importance of utilizing trusted technology vendors and safeguarding sensitive technologies—reinforcing mutual confidence and strategic interdependence between the two nations.⁸

Recent developments in the bilateral ties

Despite deepening ties, challenges will persist in the India-US relationship, as is characteristic of any complex bilateral engagement. These differences—particularly on trade and immigration—will require careful diplomatic navigation and pragmatic solutions. However, the breadth and depth of the partnership ensure that both nations can effectively manage differences. Moreover, when one looks at the history of this relationship, the difficult journey it has travelled throughout the cold War and post-cold War periods, inspires optimism and highlights the resilience, strong commitment, and capability of both

countries to navigate and resolve existing differences with ease.

Currently, one key area of negotiation is trade, where discussions on a comprehensive trade deal are ongoing. Commenting on the significance of this proposed bilateral trade deal, Union Commerce and Industry Minister Shri Piyush Goyal recently said that it will be the “mother of all deals” that will provide huge opportunities for Indians and Americans to work together. His remarks underscore New Delhi’s strong commitment to finding pragmatic solutions and deepening its economic ties with the US.⁹

However, recent developments have introduced some degree of uncertainty. In early April 2025, U.S. President Donald Trump announced a baseline 10% tariff on imports from 185 countries and a 26% reciprocal tariff on select Indian goods, particularly seafood. India’s \$7 billion shrimp industry, heavily reliant on U.S. markets, was among the first to feel the impact as these tariffs briefly took effect on April 9. However, following pushback from U.S. industry leaders and international stakeholders, the administration decided to pause the broader implementation of reciprocal tariffs, including those targeting

India, to allow space for diplomatic negotiations. According to India Ratings and Research (Ind-Ra), the proposed tariffs—had they been enforced fully—could have led to a \$2 to \$7 billion reduction in Indian exports to the US in FY26. The Confederation of Indian Industry (CII) warned that such actions could undo the progress made in bilateral trade relations. However, the suspension of the tariffs has created an opportunity for renewed dialogue and potential compromise.

Despite these challenges, the overall trajectory of India-US economic relations remain broadly positive. Unlike past decades, where mistrust led to stagnation, today's India-US engagement is marked by institutionalized mechanisms that enable the two nations to manage disputes while expanding cooperation in strategic, defense, and technological sectors. India has signalled its readiness to negotiate, with External Affairs Minister S. Jaishankar affirming on March 10, 2025, that "India will engage proactively to protect its economic interests," suggesting a diplomatic strategy to mitigate tariff impacts while maintaining strong economic ties.

This evolving partnership demonstrates that while trade tensions may arise, they no longer

define the overall relationship. Unlike past decades, where differences led to stagnation, today's India-U.S. engagement is marked by institutionalized mechanisms that enable the two nations to manage disputes while expanding cooperation in strategic, defense, and technological sectors. The resilience and adaptability of this partnership ensure that economic challenges, such as tariff concerns, can be addressed without derailing the broader progress in bilateral relations.

Conclusion

In conclusion, a second Trump presidency is poised to continue strengthening the strategic partnership between New Delhi and Washington. This partnership will be defined by a focus on countering China's expanding influence, upholding a firm stance on terrorism, and ensuring that South Asia aligns with the Indo-Pacific priorities of the United States. Driven by Trump's hallmark transactional diplomacy, this phase of engagement is expected to yield deeper economic cooperation and strategic alignment, particularly as his hardline stance on Pakistan continues to align with India's regional security interests. Nonetheless, potential economic friction—such as tariff impositions—poses challenges that may complicate the bilateral trade agenda.

Despite this, the institutionalized mechanisms now in place provide stability, ensuring that trade tensions do not derail the broader strategic ties. Unlike previous periods of uncertainty, India's enhanced economic and strategic position allows it to engage more effectively in negotiations, ensuring that its interests are more effectively represented. New Delhi's central role in Washington's Indo-Pacific

strategy remains a cornerstone of the relationship, further solidifying the enduring strategic partnership between the two democracies. As the contours of US foreign policy take shape under Trump's second term, global attention will remain focused on how this partnership evolves—particularly in the context of countering assertive China and fostering regional stability in South Asia and the broader Indo-Pacific.

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