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Trump 2.0: India-US Relations

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Chanakya University Special Report No.CU-SCB/2024-25/SR-001

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Image source: Hindustan Times

Acknowledgement

Executive Summary

U.S. leadership change has altered the dynamics of the world. With Donald Trump assuming the presidency in 2025, a look into the opportunities and risks for India becomes crucial. This report identifies strategic priorities, opportunities, and challenges for India in Trump 2.0. The report discusses the U.S.'s expectations and interests in its partnership with India by evaluating Trump 1.0's policy priorities. The emphasize is on the importance of the U.S.–India collaboration in addressing global challenges such as the Indo-Pacific security architecture, Artificial intelligence and technology, climate change, and economic stability.

Donald Trump's presidency from 2017 to 2021 is a decisive phase in U.S.–India relations. The prominent feature was a transactional diplomacy framework concentrating on economic interests and strategic competition, mainly with China. He deviated from traditional U.S. foreign policy norms, amplifying the 'America First' policy and leveraging economic and defence strategies to counterbalance China's growing influence. This era offered opportunities for India to enhance defense partnerships, deepen economic ties, and assert its geopolitical role in the Indo-Pacific region. Parallelly, challenges such as trade conflicts, immigration policy challenges, and over-dependence on U.S. defense technology also emerged. The report underscores the need for India to balance strategic autonomy while deepening cooperation and collaboration with the U.S. during his second tenure.

Strategic priorities for India in the second tenure include strengthening defense cooperation under agreements like Basic Exchange and Cooperation Agreement (BECA) and Communications Compatibility and Security Agreement (COMCASA), enhancing trade relations, and leveraging technology partnerships to address emerging challenges. The U.S. expects India to align more closely with its strategic objectives through countering China and advancing democratic values. While areas of convergence include shared interests in regional security and economic growth, divergences persist in trade policies and immigration issues.

The analysis gives prominence to India's opportunities to fill gaps left by U.S. retrenchment from multilateral spaces, utilizing its diaspora to build advocacy and soft power, and expanding its leadership role in global governance. The report advocates that India formulate inclusive immigration policies, comply with co-production and technology-sharing agreements in defence, and engage in multilateral trade frameworks to ensure balanced and inclusive growth.

As seen in the report, C-SPAN's repository is employed for a targeted approach to analyze campaign speeches and presidential debates (a total of 110) delivered by President-Elect Trump during the 118th Congress (2023-2024). The inclusion criteria focused on campaign-related speeches and debates, ensuring relevance to electoral discourse and

policy articulation. Thematic mapping identified key areas such as geoeconomics, defence, trade, and 'America First' policy. Contextual and linguistic analyses provided insights into the strategic intent behind Trump's speeches, while comparative evaluation and triangulation with secondary sources ensured comprehensive findings.

The report's limitations include its reliance on curated speeches, which may exclude broader political communication. Its focus on the 118th Congress limits the analysis of trends over time. Furthermore, the rhetorical nature of campaign speeches may or may not fully align with actionable policy outcomes. Despite these constraints, the findings offer critical insights into the interplay between U.S. policy priorities and India's strategic objectives, providing a pathway for navigating bilateral relations in an evolving multiplex global order.

At a critical juncture where global challenges such as Indo-Pacific security, climate change, and economic stability amplify, the U.S.-India partnership has become a cornerstone of international cooperation. India must leverage its geopolitical advantages, advocating for balanced trade policies and fostering defence and technological collaborations. By preparing for leadership roles in multilateral institutions and promoting a multipolar global order, India can position itself as a key player in shaping the future of international relations.

Section 1: Trump 1.0 And His Foreign Policy Approach (2017– 2021)

Donald Trump's presidency marks a significant milestone in the current global landscape. The U.S. and India's relations during this change in the world order become critical to look at. Understanding Trump's motivations, priorities, and policies is critical and essential for a compelling analysis of India-USA relations. President Donald Trump's 2017 - 2021 tenure marked a significant departure from traditional US foreign policy norms, emphasizing a transactional approach to diplomacy, concentrating on economic interests and strategic competition, especially with China. Analyzing his policies and actions from his first tenure (2017–2021) offers critical insights into the trajectory of bilateral relations and helps anticipate potential policy directions for his second tenure.

As reflected in Trump's 1.0 presidency, his leadership style has shaped myriad engagements, especially bilateral engagements, characterized by personal rapport and direct negotiations. Regular high-level interactions between Indian and US leaders during Trump's tenure reflected a deepening of strategic ties and underscored his diplomacy's personalized nature. These moves and a focus on renegotiating trade agreements reshaped the U.S.'s relationships globally, including with India. However, despite some challenges—like the imposition of trade tariffs and a complex approach to regional issues like Afghanistan and Pakistan—Trump's administration maintained and even expanded Defence cooperation with India, particularly in the face of a growing China. This relationship saw the reinvigoration of the Quad and intensified Defence exercises, signaling closer alignment in strategic interests. Analyzing his speeches provides a lens into his approach and priorities, with an emphasis on bilateral engagements ranging from defence cooperation to economic ties and their impact on India's strategic interests.

The global political ecosystem is profoundly transformed, marked by turbulence and recalibration. The gradual decline of U.S. and Russian dominance, protracted conflict in Europe, and persistent instability in the Middle East underscore a world in flux. Simultaneously, the rise of Asian powers like India and China, the intensification of trade wars to counter China's assertiveness, and shifting power alignments in the Indo-Pacific region are redefining the global order. These dynamics signal a transitional phase with far-reaching implications for international relations and geopolitical strategies. In this transitional phase, the United States strategically navigates its role as a 'principal balancer,' with domestic politics and leadership significantly influencing its foreign and domestic policy approaches. These dynamics collectively signal a redefinition of international relations with far-reaching implications for global stability.

Donald Trump's 2017- 2021 foreign policy approach moved away from collaborative international engagements through unilateral decisions to withdraw from agreements like

the Paris Climate Accord and the Iran Nuclear Deal. Trade and Economic policies aimed at renegotiating trade deals to address deficits further strained relationships with key partners, such as China and the European Union (EU). Defence policies emphasized burden-sharing among NATO allies, challenging the foundations of long-standing security partnerships. These shifts introduced unpredictability into international relations, creating vacuums that competitors such as China and Russia sought to exploit, thereby altering the global balance of power. Traditional allies grappled with strained partnerships, while skepticism toward multilateral institutions weakened U.S. influence within global governance frameworks. This period of disruption and redefinition sets the stage for a deeper exploration of its implications, particularly for India-U.S. relations, as India seeks to navigate the complex geopolitical and economic dynamics of a post-Trump era. Despite unconventional rhetoric, many of Trump's foreign policy actions aligned with traditional U.S. strategies, indicating a blend of continuity and change. The effectiveness of Trump's policies in achieving long-term strategic goals remains debated among scholars and policymakers.

The geopolitical landscape has undergone significant changes since Trump left office. The USA has increased multilateral engagements, thereby shaping the geopolitical landscape. Under the Biden administration, the US has redefined its approach to India, focusing more on shared democratic values, multilateralism, and climate action. Simultaneously, global shifts—such as the Russia-Ukraine war, China's increasing assertiveness, and economic challenges—present new complexities. Evaluating Trump's approach in light of these developments offers a deeper understanding of potential challenges and opportunities for India-US relations. The foreign policy style of President-elect Donald Trump is marked by high unpredictability, creating opportunities and uncertainties for India.

Section 2: Methodology

Data Collection

The primary data for this study were collected from C-SPAN's publicly available repository, focusing on speeches delivered by President-Elect Trump. To ensure relevance and comprehensiveness, the search was conducted using the following inclusion criteria based on the filters available on the C-SPAN website. The inclusion strategy is [Donald J. Trump + Campaign 2024 + Speech].

Inclusion Criteria

- **Filter 1 (Congress): 118th Congress (2023-2024):** To capture legislative and policy-related speeches during the specified congressional session, all speeches analyzed are from the campaigns for the 118th Congress elections. The period covered in this campaign is between January 3, 2023, and January 2, 2025.

- **Filter 2 (Person): Donald J. Trump's Campaign 2024:** Based on the objectives to analyze the potential policy choices of the United States under Trump 2.0, campaign-related speeches as part of the electoral discourse were chosen. This also includes the speeches from the two presidential debates President-Elect Trump spoke at.

- **Filter 3 (Event Type): Speech:** President-Elect Trump's policy priorities were studied specifically through his campaign speeches and presidential debates to extract spoken content rather than other forms of communication, such as interviews or press briefings.

Exclusion Criteria

The exclusion criteria for this study were designed to focus exclusively on campaign-related speeches and presidential debates delivered by Donald J. Trump during the 118th Congress (2023-2024) campaign period, from January 3, 2023, to January 2, 2025. Speeches delivered by individuals other than Trump, such as campaign surrogates or political figures, were excluded. Additionally, any speeches that were not part of the electoral discourse—such as policy speeches, national security briefings, or presidential duties—were omitted. Speeches outside the specified time frame and those delivered post-election results were also excluded. Additionally, non-speech communications, including interviews, press briefings, and social media posts, were not considered, ensuring that only formal campaign speeches and presidential debates were analyzed. This approach ensured a focused analysis of Trump's policy priorities articulated in his campaign speeches and debates.

This targeted search strategy enabled the identification of a curated corpus of speeches reflecting a range of themes, including policy articulation, campaign rhetoric, and public engagement. A total of 110 speeches were reviewed and analyzed. Each speech was examined to ensure its alignment with the research objectives, eliminating any entries that did not fit the parameters mentioned below.

Analysis Criteria

The report employs a theme-based discourse analysis framework. This approach identifies and interprets the data's recurring patterns, themes, and constructs. The following steps guided the methodologies:

Thematic Mapping

The initial set of themes was identified by reviewing scholarly articles, government reports, and documents from Trump 1.0. The pre-defined themes are Geoeconomics, Energy and Civil Nuclear Security, and Defence and National Security. These were also selected based on their relevance to the research questions and prominence in the foreign policy discourse for Trump 2.0. Further, a few emergent themes were inductively identified through the initial review of the speeches. These emergent themes are 'America First Policy,' voter turnout, Global Governance: Peace and Conflict, and 'Make America Great Again.' This allowed for the analysis to encompass themes and patterns that were initially not identified, thus adding relevant yet unanticipated elements to the analysis.

Contextual analysis

The speeches were analyzed in their political, geopolitical, and economic contexts. For instance, campaign speeches were examined with an emphasis on the impact of Trump's policy priorities on global policies, geopolitical realities of the world, and implications on South Asia, specifically the India–Pakistan–China (IPC) region, along with the impact on USA's domestic issues.

Linguistic analysis

Linguistic markers, such as tone, metaphors, and repetitive phrases, often signal underlying strategic intent or ideological positioning paid attention to. This helped to reveal not only what was being said but also how it was being communicated.

Triangulation with Secondary Sources

The findings from primary data were cross verified with secondary sources to ensure validity and a comprehensive understanding of the discursive pattern. The secondary sources were policy documents, scholarly analyses, and reports from various think tanks. By employing

this rigorous methodology, the analyses are documented in a matrix. Through the matrix, the report identified and analyzed the interplay between President-Elect Trump's speeches and the broader geopolitical and economic context, particularly concerning the IPC region. The insights derived from this matrix contribute to understanding how the identified themes are utilised in political communication international system strategies and how they reflect policy priorities and ideological orientation at aeta-levels.

Limitations

This report is subject to several limitations. It relies on a curated selection of speeches from C-SPAN. This may inadvertently exclude relevant discourses in other forms of political communication, such as social media. The temporal scope, limited to the 118th Congress and the 2024 campaign period, constrains the analysis of broader rhetorical trends over time; for example, the speeches of the Trump 1.0 election campaign are not analyzed. While thematic coding follows a systematic approach, it remains susceptible to subjective interpretation.

Furthermore, the report does not account for audience reception, which limits insights into the speeches' broader impact on policy decisions. Additionally, the campaign rhetoric often emphasizes broad emotional appeals over actionable policy, creating discrepancies between intent and governance. Biopics and related narratives may selectively represent events, leading to potential biases. The evolving nature of political discourse complicates static conclusions, while the subjective interpretation of speeches may skew analyses. Additionally, validating claims against policy outcomes can be challenging. These factors necessitate critical triangulation of sources to ensure balanced and accurate insights.

Section 3: Discussion

Energy and Civil Nuclear Security

Energy and civil nuclear security are crucial for Trump's Administration 2.0 as they align with his vision of bolstering energy self-independence and maximization of domestic resources. This addresses domestic energy needs and strategically positions the U.S. in the global oil trade, offering potential leverage in West Asian politics and other geopolitical hotspots heavily tied to the oil economy.

In his October 21, 2024, campaign rally speech, Donald Trump expressed his disapproval of renewable energy policies despite his support for American manufacturing and figures like Elon Musk. He stated, "...on day one of the Trump administration I will terminate the insane electric vehicle mandate. The green scam will end..." Later, on August 19, 2024, during a speech in Pennsylvania, he reiterated his criticism of the EV mandate, calling it "absolutely crazy" and questioning its feasibility: "We don't have enough electricity for ourselves; how can we put our cars on it?" Trump emphasized his commitment to advancing non-renewable energy sources, proposing "rapid approvals for all forms of energy, including nuclear...we will make a historical amendment to bring in small, big, modular, nuclear reactors on line, building these massive plants worth 20 billion." As an alternative to renewable energy, he highlighted the United States' substantial oil and gas reserves, which he referred to as "liquid gold." Speaking in Midland, Texas, on February 15, 2024, he declared, "We are going to unleash American energy and end our reliance on foreign oil from hostile nations," and in Pittsburgh, Pennsylvania, on March 10, 2024, he lauded the state's natural gas industry as "a treasure for this country" while vowing to "stop the war on energy."

This shift for India provides opportunities for collaboration in modular nuclear reactor technologies and natural gas trade and potentially enhances India's energy diversification and civil nuclear capabilities. However, India also faces risks, including exposure to fossil fuel price volatility, alignment pressures with U.S. energy policies, and challenges balancing its renewable energy goals with growing energy demands.

The global impact of Trump's energy policies could realign trade flows, reduce reliance on West Asian and Russian oil, and stimulate innovation in modular nuclear reactors. However, prioritizing fossil fuels may hinder global climate action, strain international climate negotiations, and slow renewable energy investments worldwide. Trump's Administration 2.0 aims to position the United States as a leader in energy production, using its abundant resources and advanced technologies to influence domestic and global energy dynamics while securing America's economic and strategic interests.

Directions for India

India must speed up its energy cooperation with the United States, focusing on balancing imports of fossil fuels with more investment in clean energy to achieve a sustainable energy future. Harnessing U.S. expertise in modular nuclear technology can significantly diversify India's clean energy portfolio while fulfilling long-term energy security needs. To avoid the threat of any possible shift in U.S. policy, India must aggressively pursue energy collaborations with various nations, ensuring resilience and diversification. Balancing fossil fuel imports with developing renewable energy projects in-house will ensure sustainability goals and reduce environmental footprint. Furthermore, advocating for technology transfers in the nuclear and natural gas sectors will boost India's indigenous production capabilities, fostering self-reliance and technological advancement in critical energy domains.

Geoeconomics

Geoeconomics, trade and manufacturing take centre stage in Trump's vision for revitalizing the American economy. Speaking in Michigan on November 4, 2024, he vowed to counteract China's cost-saving strategies, saying, "If they (China) want to build a plant in Mexico owned by China so they can save costs, I'm going to put 10% on every single car coming out of that plant, and if that's not enough, I will make it 200, 300, 800. I don't give a damn." Trump's disdain for multilateral trade agreements was evident in Iowa on November 18, 2023, where he declared, "Under the next administration… the Biden plan for 'Trans-Pacific Partnership (TPP) Two' will be dead on day one," emphasizing his resistance to any trade pact that might "hollow out U.S. manufacturing and trigger job losses." In Fort Dodge, he described the proposed Pacific Trade Pact as "worse than the first one (TPP), threatening to pulverize farmers and manufacturers."

Throughout his campaign, Trump highlighted his commitment to reducing regulatory burdens, re-negotiating trade deals, and implementing tariffs to support domestic industries. On January 7, 2025, he told the press, "…we cut the most regulations in the history of our country. I did that all in four years… we will impose new tariffs so the products in our stores will once again be stamped with those beautiful words, made in the USA." This sentiment aligns with his August 19, 2024, statement in Pennsylvania about modernizing trade policies and ensuring fair reciprocity, saying, "We will re-negotiate with Japan and South Korea, with Canada, Mexico, many … they'll sell our product in America, without having to pay any substantial tariff or tax and build their factories…"

His administration seeks to address global supply chain vulnerabilities by encouraging countries like India to serve as reliable partners in diversifying technology, semiconductors, and pharmaceutical supply chains. India's potential to gain preferential access to U.S. markets through bilateral trade agreements aligns with Trump's focus on building

trustworthiness and resilience in partnerships. However, India faces risks, including policy shifts, tariff negotiations, and geopolitical pressures stemming from U.S. geoeconomic strategies.

Global implications of Trump's approach include amplified economic nationalism, potential fragmentation of multilateral trade systems, and intensified U.S.–China tech rivalries. Alliances such as the Quad and AUKUS may grow in prominence to secure supply chains and technological standards. By aligning domestic energy and economic strategies with a strong geopolitical stance, Trump's administration 2.0 seeks to redefine America's position on the global stage while prioritizing "America First" policies.

Directions for India

India should focus on building trade relationships within South and Southeast Asia to stop overdependence on any single partner, strengthening regional economic integration. Concurrently, India should speed up bilateral trade negotiations with the United States, emphasizing mutual interest sectors such as information technology and renewable energy. This would align with U.S. priorities while significantly ensuring balanced growth. India also should diversify its trade beyond the U.S. market to safeguard its economic resilience. India should also propose to create mutually beneficial sector-specific agreements with the U.S., particularly in green technology and digital innovation. Adopting global standards while maintaining strategic autonomy and establishing a comprehensive national framework for emerging technologies will help India. It needs to strengthen its partnerships within the Quad to enhance further its technological capabilities in critical domains like cybersecurity, space exploration, and infrastructure resilience, thereby solidifying its position as a key global player.

Defence and National Security

Defence and national security form a cornerstone of Trump's administration 2.0, with a sharp focus on border security, immigration reform, and the "America First" agenda. On November 5, 2024, after casting his ballot in Florida, President-Elect Trump highlighted the significance of strong borders, stating, "We want strong borders, and we want people to come in. We want to be inclusive. And to me, that is a big issue... we can't allow criminals to be put back into our country." This emphasis on securing the border was reiterated in Pennsylvania on October 14, 2024, where he promised, "On day one of my new administration, I will seal the border and, by the way, we want people to come in, but they have to come in legally." During a campaign speech in El Paso, Texas, on April 5, 2024, he declared, "Our border is our first line of defence. We will finish the wall and stop illegal immigration."

Trump tied border security to broader economic goals, asserting that public funds should prioritize Americans over illegal immigrants. On October 21, 2024, in Ashville, North

Carolina, he criticized public spending on illegal migrants during disaster relief, saying, "[The Biden administration] spent a lot of money on bringing illegal migrants... so they don't have any money for the people that live here that got hit by one of the worst storms." Trump accused the Biden administration of leveraging illegal immigrants for electoral gains, remarking, "Maybe so they could vote in elections because that's a lot of people think that's why they're doing it, I don't know."

The "Make America Great Again" (MAGA) ethos was further emphasized in Greenville, North Carolina, on October 21, 2024, when Trump pledged to impose stiff tariffs on companies that outsource production, stating, "We will give our companies the lowest taxes, energy costs, and free access to the best and biggest markets... but only if they make their products here in America and hire American workers." He added, "I will never apologize for defending America, for putting America First. I will protect hard workers. I will protect our borders." This sentiment extends to national defence, as he promised on February 25, 2024, in Fayetteville, North Carolina, "We will ensure that our military remains the strongest in the world. No one will dare challenge us." Trump's vision for his second term ties defence, immigration, and economic security into a unified strategy, promoting a self-reliant and militarily strong America while advocating for policies that protect its borders, industries, and workforce.

The global impacts of these policies include strained relations with allies due to unilateral actions and a reduced role of the U.S. in multilateral governance. For India, these shifts present opportunities to deepen defence cooperation under agreements like the Basic Exchange and Cooperation Agreement (BECA) and Communications Compatibility and Security Agreement (COMCASA) and leverage the Indian diaspora for advocacy. However, strict immigration policies can hinder remittances and knowledge exchange, and overreliance on U.S. defence technology might limit India's indigenous capabilities. India must balance ties with the U.S. by fostering partnerships with other powers like Russia and France to maintain strategic autonomy.

Directions for India

India should actively advocate for adopting more inclusive U.S. immigration policies through strategic diplomatic dialogues by emphasizing the contributions of Indian professionals, students, and entrepreneurs to the U.S. economy and innovation ecosystem. This advocacy supports individual mobility and strengthens bilateral ties by building mutual benefits in technology, education and industry. India must utilize multilateral platforms such as the G20 to address pressing gaps in global governance caused by the United States' selective engagement or retrenchment from international responsibilities. By doing so, India can promote a more inclusive and cooperative world system, asserting its role as a leader through multilateral diplomacy. Additionally, strengthening domestic defence capabilities through co-production and technology transfer agreements with the U.S. will enable India to reduce its reliance on imports while building and improving indigenous innovation and industrial

growth. However, to maintain its strategic autonomy in an increasingly polarized world order, India should balance its partnerships by deepening ties with other major powers, such as Russia and France. This diversified foreign policy outlook and building resilience to external pressures will help India maintain its strategic autonomy.

Global Governance: Peace and Conflict

Global governance, especially concerning peace and conflict, is a pivotal theme in Trump's second-term vision, reflecting his emphasis on diplomacy, trade, and security. On November 5, 2024, after casting his ballot in Florida, President-Elect Trump highlighted his stance on Iran, stating, "Not looking to do damage to Iran, but they can't have a nuclear weapon. I'd like them to be a successful country, but they just can't have a nuclear weapon." This perspective aligns with his broader focus on peace through economic leverage and strategic partnerships. Speaking in Grand Rapids, Michigan, on November 4, 2024, during his final campaign rally, Trump emphasized his approach to global relations, saying, "We are going to get along great with China. I had no wars," reflecting his pride in maintaining peace during his previous term.

Trump views economic tools as integral to conflict prevention. At a rally in Pennsylvania on August 19, 2024, he explained how tariffs could serve as a deterrent to war, stating, "Imposing tariffs helps in keeping low inflation; it also gives power over that country. Tomorrow, if they want to go to war, we can say: No, if you want to go to war, we'll have to raise your tariffs." In the same speech, he announced his intent to revoke China's Most Favored Nation status while maintaining respect for President Xi Jinping. He elaborated on his proposed Trump Reciprocal Trade Act, saying, "If China or the EU or any other group of countries or country makes us pay a 100% or 200% tariff or tax, we will make them pay a reciprocal tax of the same amount. So it's basically, 'you hurt us, we hurt you.'"

Trump's approach extends to resolving ongoing conflicts, such as the Ukraine-Russia war. During the September 10, 2024, presidential debate, he described the war as one "that never should have started". He asserted that he would "have that war settled between Putin and Zelenskyy as president-elect before I take office." Stressing the economic factors behind global terrorism, Trump remarked, "Iran was broke with me... No money for Hamas, no money for terror." In Mosinee, Wisconsin, on September 7, 2024, he referenced his earlier success in combating terrorism, stating, "I defeated 100% of the ISIS caliphate, etc., and did it quickly... We knocked them out in two months. One month, actually."

Trump's administration seeks to use economic policies, strategic diplomacy, and military strength to shape global governance. For India, this vision offers both opportunities and challenges. India could amplify its role as a diplomatic mediator, particularly in conflicts like Ukraine-Russia, aligning with its rising global stature. However, reciprocal trade policies

and hardline stances on Iran may strain India's economic and energy security. By engaging in bilateral dialogues and leveraging platforms for peace mediation, India can safeguard its strategic autonomy while contributing to global stability.

Directions for India

India must proactively engage the United States in strategic dialogues on conflict resolution and trade, ensuring its interests are protected through equitable market access and tariff reciprocation. Diversifying energy partnerships, particularly in renewable energy and critical technologies, is vital to reducing single dependency on Middle Eastern oil during the instabilities caused by U.S.-Iran tensions. Additionally, amplifying joint counterterrorism operations and intelligence-sharing mechanisms with the U.S. will improve operational effectiveness, address shared security threats, and reinforce bilateral trust. However, to maintain economic and regional stability, India must balance its strategic ties with the U.S. and China, avoiding over-alignment with either power. Simultaneously, India should be a neutral mediator in global conflicts, leveraging its diplomatic strengths to contribute to conflict resolution and peacebuilding. This approach reinforces India's status as a responsible global power and enhances its credibility and influence on the world stage.

Section 4: Analysis Rubrix: Potential Implications of Trump 2.0 on India and Globe

Key Areas/ Themes	Donald J. Trump's Campaign Speech Excerpts (US Presidential Election 2024)	Potential Implications (India and Globe)
Geoeconomics: Economy, Taxation, Trade Policies, Global Supply Chains, Industries and Manufacturing	November 4, 2024: Addressing the issue of making the USA the manufacturing hub, in his final campaign rally of the 2024 cycle at Grand Rapids, Michigan, President–Elect Trump said, "*If they (China) want to build a plant in Mexico owned by China so they can save costs, I'm going to put 10% on every single car coming out of that plant, and if that's not enough, I will make it 200, 300, 800. I don't give a damn.*" November 18, 2023: Speaking to supporters in Iowa, Trump said he was against the Biden administration's regional trade deal with 13 other countries, arguing that it would hollow out U.S. manufacturing and trigger job losses. "*Under the next administration… the Biden plan for 'TPP Two' will be dead on day one,*" November 18, 2023: Speaking at Fort Dodge, Trump said, "*It's (Pacific Trade Pact) worse than the first one (TPP), threatening to pulverize farmers and manufacturers with another massive globalist monstrosity designed to turbocharge outsourcing to Asia.*"	**India** **Opportunities:** • Become a reliable partner: Assuming the role of a trustworthy partner for the U.S. in its supply chain diversification – technology, semiconductors, and pharmaceuticals. • Negotiate better trade deals and preferential trade agreements with a core focus on trust and resilience. The sector–specific concentration could be in IT, pharmaceuticals, and textiles. • To boost India's tech infrastructure, the immediate focus must also be on iCET (Initiative on Critical and Emerging Technologies). • Become a hub for manufacturing critical resources – semiconductors, solar panels, etc. for iCET and energy alongside being a supply chain leader. Attracting investments in manufacturing semiconductors, AI applications, and renewable energy technologies.

October 21, 2024: Speaking at Greenville, North Carolina, President-Elect Trump said, "*After NAFTA (North American Free Trade Agreement), the worst trade deal ever made, and China's entry into the World Trade Organization when they were considered a growing nation. We are a developing nation. Have you ever seen some of our places? We are developing more than them. We needed more than they do. They got all of these benefits that we were not entitled to because stupid people were negotiating for us.*" January 7, 2025: President- Elect Trump addresses the press from Mar-a-lago "*...we cut the most regulations in the history of our country. I did that all in four years...we will impose new tariffs so the products in our stores will once again be stamped with those beautiful words, made in the USA.*" August 19, 2024: At Pennsylvania,President-Nominee Trump said, "*We will modernize our trade policies...re-negotiate with Japan and South Korea, with Canada, Mexico, many ... The way they'll sell our product in America, without having to pay any substantial tariff or tax and build their factories ...*"	**Risks:** • The threat of U.S. sanctions may hamper India's economic and trade plan. For example, oil imports from Iran, defense imports from Russia, etc. • Undue dependency on the U.S. can expose Indian markets to risks. • Pressure to reduce or waive tariffs and potential adverse effects on the domestic market. • Fracturing multilateralism could stunt the benefits of an integrated market. • Other growing contenders – EU, Japan, South Korea, etc. – for IT collaborations with the U.S. **Recommendations:** • Diversification of trade relations. Concentrate on South, East, and Southeast Asia. • Prioritize the ongoing negotiations for bilateral trade with the U.S. • Promote sector-specific agreements and private entity involvement in certain key sectors. • Preserve strategic autonomy through standard setting for certain emerging technologies in alignment with global standards and local needs.

| | June 15, 2024: In Michigan Detroit, speaking of industries and manufacturing, President-Nominee Trump said, *"Detroit will again dominate the world market. We'll fight unfair trade practices and protect American workers."*

December 16, 2024: Palm Beach, Florida, *"We will treat people fairly. The word reciprocal is important. If India charges us 100% and we charge them nothing, they send a bicycle, and we send them a bicycle, they charge 100% and 200%. Brazil charges us a lot. If they were the charges, that's fine, but we will charge them the same thing."* | • Prioritize Quad partnerships to enhance tech capabilities in areas like cybersecurity, space, and critical infrastructure.

Global Impacts

• Increased protectionism has weakened multilateral organisations such as the WTO, the WHO, and the UN.

• Global trade faultlines have arisen due to increased geopolitical tensions and related insecurity.

• Increased rivalry between nation-states has intensified geopolitical competition, creating newer alliances. |
| **Energy and Civil Nuclear Security:** Energy Independence, Natural Gas and Fracking | October 21, 2024: Although he wants to protect people like Elon Musk, Trump showcases his displeasure with renewable energy. He says, *"...on day one of the Trump administration I will terminate the insane electric vehicle mandate. the green scam will end..."* | **India**
Opportunities:

• Collaborate for technologies used to extract natural gas and shale gas, such that India's energy sources are diversified. This will help secure India's energy needs while the West Asian region grapples with conflicts.

• Civil nuclear agreements can be enhanced to enhance India's nuclear capabilities and get access to newer safety technologies. |

August 19, 2024: In Pennsylvania, President-Elect Trump said, "*The EV mandate is absolutely crazy. We don't have enough electricity for ourselves, how can we put our cars on it?*" Further, he said, "*Rapid approvals for all forms of energy, including nuclear… we will make a historical amendment to bring in small, big, modular, nuclear reactors on line, building these massive plants worth 20 billion*". He suggests an alternative for Renewable source "*…we are sitting on the largest amount of oil and gas, I call it liquid gold.*"	**Risks:** • The global efforts on renewable energy will see a hit due to the withdrawal of the U.S. from significant climate pacts and related green funding. This can slow India's progress towards global goals. • U.S. involvement in the oil and fossil fuel market can increase the possibility of disrupting the current energy economy, leading to increased conflicts in the West Asian region. • Increased dependence on the U.S. for energy can hinder India's strategic autonomy.
October 14, 2024:In Pennsylvania,President-Nominee Trump said, "*Pennsylvania energy workers are being brutalized by Biden's destructive Green New Deal. Green New Deal will destroy our country.*"	**Recommendations:** • Strike a balance between renewable and non-renewable energy investments in India through robust collaborations with the U.S.
February 15, 2024: In Midland, Texas, speaking on energy security, "*We are going to unleash American energy and end our reliance on foreign oil from hostile nations.*"	• Position India as an advocate for a balanced energy mix approach at international forums to counter polarisation in energy policies.
March 10, 2024: In Pittsburgh, Pennsylvania,President-Nominee Trump said, "*Pennsylvania's natural gas industry is a treasure for this country. We'll stop the war on energy.*"	• Negotiate and foster technology transfers for modular nuclear technology and natural and shale gas extraction methods.

| | | • Diversification of partners to ensure resilience to shocks from potential policy changes in the U.S. |

Long-Term Perspective:

• Support and foster domestic innovation for energy independence.

• Plan the transition from non-renewable to renewable so that development is not hindered.

Global Impacts:

• A resurgence of U.S. oil and gas production could realign global energy trade flows, reducing reliance on West Asian and Russian oil. However, this also has downsides, such as increased conflicts.

• Trump might also consider the alleged substantial oil reserves in Alaska while making policy decisions for energy security.

• Climate negotiations will take a back seat.

• Potential for energy nationalism, with countries focusing on maximizing their natural resources and limiting reliance on foreign energy. This might increase global inequalities.

Defence & National Security: Border Security, Immigration, Deportation and MAGA	November 5, 2024: On election day in Florida, after casting his ballot, President-Elect Trump, speaking to the reporters, said, *"We want strong border,s and we want people to come in. We want to be totally inclusive. And to me, that is a big issue. And a lot of people said inflation is a disaster. But I think its a second issue. I think the first is the border. We can't allow criminals to be put back into our country."* October 21, 2024: President-Elect Trump stressed Making America Great Again in his campaign speech at Ashville, North Carolina. A few excerpts are: *"We will stop throwing money overseas, and we will let our country benefit."*; *"We are going to put America first."*; *"We've been helping [other] countries for 50 years. We have been helping them for 50 years, and it never stops. When we need help from them, they are not there."* In the same campaign, stressing the need to stop the USA's public expenditure on illegal immigrants, he said, *"Now, you know, ... but they (Biden administration) spent a lot of money on bringing illegal migrants, people that came into our country illegally and taking them in and all of the money they spent come numbers and nobody can even believe so they don't have any money for the people that live here that got hit by one of the worst storms."*	**India** **Opportunities:** • Strengthen bilateral relations to fill gaps left by U.S. retrenchment in multilateral spaces. • Soft power advocacy through the Indian diaspora. • Deepen Defence cooperation with the U.S. under frameworks like BECA and COMCASA. • Collaborate on joint exercises to enhance interoperability and strategic capabilities. **Risks:** • Indian professionals and students may face stricter immigration policies, impacting knowledge exchange and remittances. • Being drawn into great power rivalries might complicate India's non-alignment stance. • Dependence on U.S. Defence technology could limit India's strategic autonomy at times of need. **Recommendations:** • Advocate for more inclusive immigration policies through diplomatic dialogues.

	Once in office, he wants to use public spending to support the USA's internal infrastructure. He also accuses the Biden administration of using illegal immigrants for the benefit of the vote bank, saying, *"…they were not supposed to be spending the money on taking illegal migrants maybe so they could vote in the election because that's a lot of people think that's why they're doing it, I don't know."*	• Utilize platforms like G20 to address global governance gaps resulting from U.S. retrenchment.
	Further, in the same campaign speech, he thanked Elon Musk for his help and contribution through 'Star Link' at a time of need (Disaterous Helene Hurricane).	• Co-production and technology transfer agreements are the future for strengthening domestic capabilities. Diversify strategic partners – Russia, France, Israel, etc.
	October 21, 2024: Speaking at Greenville, North Carolina, President-Elect Trump said, *"We will give our companies the lowest taxes, energy costs, and free access to the best and biggest markets on the planet, but only if they make their products here in America and hire American workers…if these companies don't make their products here if they make them in another country and bring them here, they will face a stiff tariff—a very big penalty. I will never apologize for defending America, for putting America First. I will protect hard workers. I will protect our borders."*	**Long-Term Perspective:** • India should prepare to step into leadership roles in multilateral institutions, promoting a multipolar global order as U.S. dominance recedes. • Concentrate on planning for the long-term settlement of expatriates. • Foster R&D in defense and security such that India becomes a defense manufacturing and exporting hub.

	October 14, 2024: On the matters of immigration, in Pennsylvania, President–Nominee Trump said, "*On day one of my new administration, I will seal the border, and by the way, we want people to come in, but they have to come in legally.*"	Global Impacts:
		• Reduced U.S. engagement in multilateral institutions could weaken global governance structures.
	June 6, 2024: In Phoenix, Arizona, President Nominee Trump said, "*We are going to bring manufacturing back to America. No more relying on foreign nations for critical goods.*"	• Strained relations with allies due to unilateral actions and reduced contributions to global initiatives.
	February 25, 2024: In Fayetteville, North Carolina, speaking of the Military strength, "*We will ensure that our military remains the strongest in the world. No one will dare challenge us.*"	
	April 5, 2024: In El Paso/ El Paso County Coliseum, Texas, President–Nominee Trump said, "*Our border is our first line of Defence. We will finish the wall and stop illegal immigration.*"	

Global Governance: Peace and Conflict	November 5, 2024: On election day in Florida, after casting his ballot, President-Elect Trump, speaking to the reporters, said, "*Not looking to do damage to Iran, but they can't have a nuclear weapon. I'd like them to be a very successful country, but they just can't have a nuclear weapon.*" November 4, 2024: In his final campaign rally of the 2024 cycle, at Grand Rapids, Michigan, President-Elect Trump said, "*We are going to get along great with China. I had no wars*" about his previous administration term. August 19, 2024: In Pennsylvania, President-Elect Trump, talking about controlling wars in his administration, said, "*Imposing tariff helps in keeping inflation low; it also gives power over that country. Tomorrow, if they wanna go to war, we can say: No, if you do wanna go to war, we'll have to raise your tariffs.*"	**India** **Opportunities:** • Potential for India to mediate the Ukraine–Russia war by complimenting U.S. efforts, enhancing India's strategic position. • The Trump Reciprocal Trade Act is an opportunity for India. It provides a framework for renegotiating trade terms with the U.S. • U.S.'s take on financially isolating terror-sponsoring states is in alignment with India's stance on terrorism, especially in connection to Pakistan. **Risks:** • U.S. sanctions on Iran and an attempt to promote its fossil fuels might destabilize West Asia, impacting India's energy security and diaspora. • India may face challenges in maintaining neutrality in the trade tensions while pursuing its economic interests.

| | Further, at the same rally, talking about the Most Favoured Nation, President-Elect Trump said, "*In my next term, I will revoke China's Most Favoured Nation status, but I do have great respect for President Xi, I feel China and US will get along well together, but Covid came in, that was a step too far. I had a great relationship with most of the leaders.. I'll pass the Trump Reciprocal Trade Act so that if China or any other country ... its not just China, the EU treats us very badly, we've a 200B dollars deficit now, but if the China or the EU or any other group of countries or country makes us pay a 100% or 200% tariff or tax, we will make them pay a reciprocal tax, of the exact same amount. So its basically 'you heard us, we heard you'...*"

September 10, 2024: On the matter of the ongoing war in Europe, Trump, in his presidential debate, argued, "*This is a war (Ukraine – Russia) that never should have started..*" and he would "*...have that war settled between Putin and Zelenskyy as president-elect before I take office.*" | • Disruptions in global trade and supply chains due to reciprocal taxation could impact India's economic growth.

• Impact of Ukraine War on India's Strategic Autonomy: India has historically maintained a neutral stance in conflicts involving significant powers. The discussion highlights a possible geopolitical dynamic where India's strategic ties with Russia (energy, Defence) and the West (technology, trade) could face pressure depending on the war's resolution.

Recommendations:

• Proactively engage the U.S. on trade and conflict resolution to safeguard India's interests in policies like tariff reciprocation.

• Strengthen alternative strategic partnerships.

• Position India as a non-aligned mediator in global conflicts. |

In the debate, he also argues that money is crucial in increasing terror activities. He says, "*Iran was broke with me... No money for Hamas, no money for terror.*"

September 7, 2024, in Mosinee, Wisconsin, Trump stated: "*I defeated 100% of the ISIS caliphate, etc., and did it quickly...These people are something we knocked them out in two months. One month Actually...*"

Long-Term Perspective:

• Advocate for multilateral trade agreements that minimize the impact of unilateral measures like reciprocal tariffs.

• Strengthen India's role in global peace-building to counterbalance the U.S.

• Strategically leverage alliances to counter U.S.-China trade tensions and their implications for global markets.

Global Impacts:

• The Trump Reciprocal Trade Act could trigger global trade retaliations, destabilizing global trade.

• U.S. withdrawal or restructuring of trade policies like the Most Favored Nation (MFN) status could undermine multilateral trade systems.

• U.S.-China trade and geopolitical tensions may lead to more competing and conflicting interests.

Section 5: Conclusion and Way Forward

The U.S.-India relationship during Trump's Second tenure presents signs of both opportunities and challenges. Strengthening this partnership is vital for bilateral benefits and addressing global challenges like security, technological advancement, and economic stability. The success of the Indo-U.S. relationship will be determined by the strategic autonomy leveraged by India in times of shifting global interests.

The analysis reveals the necessity of seizing opportunities to strengthen cooperation on a bilateral basis while maintaining strategic autonomy. India should participate in the Defence and technology partnerships with the U.S. and should use agreements like BECA and COMCASA to improve its strategic posture. At the same time, the emphasis on co-production and technology transfer will enhance India's Defence industry (Atmanirbhar Bharat). Trade negotiations should focus on mutual gains, while diplomatic efforts should be directed at obtaining reasonable immigration policies to facilitate the exchange of knowledge and growth.

India also has to avoid the risks, which are stricter immigration policies, trade disputes, and overreliance on technology from the US. This will ensure that India retains its strategic autonomy. This can also be done through a balanced approach that includes diversifying partnerships with countries such as Russia, France, and Japan. To proactively engage global governance gaps, India can use platforms like the G20 to push for multilateral solutions to common challenges.

In the future, India should try to:

a. Be a leader in multilateral institutions and support the formation of a multiplex global order.
b. Strengthen its defense industry in order to decrease the share of foreign technology and ensure security independence.
c. Become a neutral power in global conflicts and thus strengthen its position as a responsible global player.

As for the global consequences of the U.S. policies, including the "America First" policy and the shifting trade dynamics, India must have a proactive and balanced strategy. Thus, by building up its position in the global peace-building processes and using alliances to respond to geopolitical tensions, India can guarantee stability and growth in the conditions of increasing international competition.

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