



IS TRUMP ADDING TO THE BACKSLIDING OF THE ‘WORLD’S BIGGEST DEMOCRACY’?

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With his steep tariffs and cheap insults, Trump has eroded a decades-old Indian public consensus of a pro-America policy and revived old animosities towards the US. If an estranged India's strategic engagement with America and the democratic world loosens, it can only be more bad news for its troubled democracy. Not that America has ever seemed to care about Modi's assaults on democracy, or he, about its sensitivities.

India's plight in Trump's second term

Donald Trump may be engineering a momentous change in the familiar template of Indo-US relations. India is now among the toughest hit by his tariff tantrums, having been slapped with a jaw-dropping 50% tariff. It began with a high 25% at the end of July, and was doubled the very next week as penalty for India's trade and energy dealings with Russia. Even if the tariffs are reversed or moderated at a later date, the impact of the blow dealt by Trump's dismissive treatment of a country held up until recently as a fellow democratic partner and America's geopolitical ally may never be undone.

Trump has single-handedly destroyed the narrative of India's supposed importance to America as a rising economic and military power. If the high tariffs weren't bad enough, he turned the knife, calling India a "dead" economy, with which the US does "very little business," and announced a trade deal with Pakistan the same day he announced tariffs on India. The national rage and embarrassment all of this has caused in India would be difficult to manage even for the powerful Prime Minister Narendra Modi, who has invested much in strengthening relations with the US, and Trump in particular. Facing opposition attacks over his weakness in dealing with Trump and warnings not to be bullied by him, Modi has announced India will not "compromise" with its interests.

Will Trump's second term and his tariff hurricane result in remaking the much-vaunted Indo-US partnership that was painstakingly developed over decades? Is this the prelude to a parting of ways and a resetting of their relationship? What will be the geopolitical outcome if it is? And how would that impact India's democracy, already under systematic attack from its own supremacist strongman?

Trump's isolationism, his own illiberal example and his manifest distaste for multilateral institutions in any case herald more democratic backsliding worldwide and embolden authoritarian regimes everywhere. Hungary's Viktor Orbán has escalated crackdowns on civil society. Turkey's Recep Tayyip Erdoğan has intensified political repression. Modi has already started pushing an aggressive voter verification drive designed to disenfranchise minorities and other marginalized sections of the population.

In the last Trump term, Modi's government disenfranchised 1.9 million people in the northeastern state of Assam through a citizenship verification drive called the National Register of Citizens (NRC), and enacted a citizenship law that discriminated against Muslims. This time it has launched a similar voter verification drive called "special intensive revision" (SIR) of the electoral rolls that may disenfranchise nearly 7 million voters in the eastern state of Bihar. He plans to extend it nationwide, putting India's 200 million Muslims on the edge.

If these tariff disputes deepen and create distance between India and the US, will a Modi more unmoored from his democratic superpower partner and unencumbered by associated obligations, press on the gas even more?

Trade and democracy

The empirical literature on democracy and international trade relationships is scant but there are some studies pointing to a positive causal link between trade openness and democratic governance. Such a correlation would seem to be the driving the rationale for deepening trade liberalization in recent decades that saw an overlap of high levels of democratization and globalization. Both democracy and globalization rose particularly dramatically between 1960 and 2010. But the relationship between trade and democracy is far from a settled matter. While some studies showing a positive correlation suggest that trade in goods plays an important role in the process of democratization, others in fact show the opposite as more trade and globalization can erode key democratic norms such as workers' rights. Even the studies that conclude that there is a positive correlation come with the caveats that it does not hold universally and is not manifest in the short run.

Mostly conducted in the high noon of globalization or the so-called third wave of democratization in the final quarter of the last century, many of these studies seek to find out whether international trade leads to greater political freedoms. They now read as a bit quaint. China alone, with its rise to dominance in global trade and no democratization whatsoever in five decades, puts any notion of such a correlation to rest.

As does India. Trade between India and the US has increased nearly 70% in the last decade, while its plunge into illiberalism has only deepened during the time. India and US show why studies of linkages between trade and democracy have become especially difficult with the global rise of demagogues like Modi and Trump, who are as committed to neoliberalism as they are to suppression of democratic norms and institutions. As they now slug it out as heads of their notionally democratic governments, the more perceptible impact will be on geopolitics rather than democracy.

Having taken a sledgehammer to Modi's carefully cultivated strongman image and the construct of India's global ascent under his stewardship, Trump's second coming may well loosen India's strategic engagement with America. This might have implications for its democracy, in that engagement with America also entails engagement with democratic institutions beyond the presidential administration. But given America's own state of democracy at the moment and its long record of using democracy as merely a strategic device rather than a substantive goal, anticipating exactly how a distancing from America would impact India's quality of democracy would be difficult.

In any case, to objectively examine how Trump in particular may add to the ongoing democratic erosion in India, it stands to reason to first take a look at how past US presidents have approached Modi's assaults on democracy; in particular, Trump's immediate predecessor, Joe Biden. Only then would it be fair to reasonably attribute any incremental degradation in India to Trump 2.0.

Biden's laboured love for Modi

Democratic backsliding in India gathered pace in the Biden years, but the White House looked on benignly. The Biden administration was so focused on showcasing India as part of its program to contain China and project a picture of unshakable Indo-US friendship that it never publicly betrayed any impatience with the democratic erosion under Modi even if it did harbour any such concerns.

Quite to the contrary, it went out of its way to validate India's democracy in order to justify pulling the country into America's axis. For Biden, it would look silly to even admit to the backsliding in India while enlisting it in a supposedly ideological struggle against the autocratic model of China and Russia.

In their first phone conversation after Biden took charge in February 2021, for example, Modi and Biden “resolved that the rule of law and the democratic process must be upheld in Burma,” according to the *official readout of the event*.^[1] There was no mention at all of India’s own democratic decline, even though it was around this time that Sweden-based V-Dem Institute declared India had become an “electoral autocracy” and America’s own Freedom House downgraded India from a free democracy to a “partially free democracy.”

It’s not just India; the Biden administration adopted pretty much the same approach towards almost all strongmen in endangered democracies. Who can forget Biden’s hilarious democracy summits, where Modi along with the likes of Rodrigo Duterte and Jair Bolsonaro would be invited to pose as upholders of freedom and dispense homilies on justice and liberty.

India and US in a changing world

Biden’s uncritical acceptance of Modi was part of a relatively recent US foreign policy template that has evolved since the end of the Cold War. Indo-US relations have come a long way from the Cold War days, when India was a firm Soviet camp follower and deeply suspicious of American motives in the region, while the US was committed to Pakistan, its conduit to initiating a détente with China. “By 1971,” Henry Kissinger wrote in *White House Years*.^[2] “our relations with India had achieved a state of exasperatedly strained cordiality, like a couple that can neither separate nor get along.”

That strained cordiality between two giant democracies has in recent decades given way to a newfound intimacy as the US and India have courted each other for their converging strategic interests—India, to balance a near power with a distant power, and the US, for India’s potential as an Asian counterweight to America’s prime adversary, China.

Successive Indian governments, looking to broaden their options in the post-Soviet world, contributed to this strengthening of Indo-US relations as much as successive US administrations.

Beginning with Clinton, and picking up since Obama’s ‘Asia pivot’, Indo-US ties have thus gone from strength to strength. The “shared value” and “common bond” of democracy is what make the ‘world’s oldest democracy’ and the ‘world’s largest democracy’ natural partners, goes the narrative. It’s understandable why no US president would want to mess with this script, with China breathing down America’s neck.

India has thus come to enjoy a status almost similar to a treaty ally of the US even without being one, with substantial collaborations in trade, technology and defense. Successive Indian governments, looking to broaden their options in the post-Soviet world, contributed to this strengthening of Indo-US relations as much as successive US administrations.

[1] All old White House readouts which were available online now seem to have disappeared. The readout was available at <https://www.whitehouse.gov/briefing-room/statements-releases/2021/02/08/readout-of-president-joseph-r-biden-jr-call-with-prime-minister-narendra-modi-of-india/>

[2] Kissinger, Henry. 2011. *White House Years*. Simon & Schuster: New York.

Extra-special Modi

The market-friendly, right-wing BJP has been a particularly good bet for American interests in India, a country once dominated by a centre-left political milieu hostile to liberal market reforms and any strong association with the US. Modi's rise to national power in 2014, signaling India's move further right, opened fresh pathways to increase American influence in India. Of course, it came with its own set of complications, but both sides did well to manage them.

During his tenure, Obama urged India to uphold religious freedoms and lamented that Gandhi would have been shocked by the acts of religious intolerance that India was witnessing. But he did not let such concerns get in the way of his much-celebrated 'bromance' of hugs and hand-holdings with Modi in an ever-tightening embrace of India through a range of policy initiatives. He even invited Modi to address a joint session of the US Congress.

In Modi, the US found an Indian leader prepared to "overcome the hesitations of history" — as the prime minister put it at that 2016 joint session — and bandwagon with the world's only superpower. As India's own power asymmetry with China widened and that of America's narrowed, they began to lean on one another with increasing urgency. And when Trump took power the first time in 2017, whatever little awkwardness existed as a result of Modi's supremacist politics quickly melted away.

As Modi returned to power with a thumping majority in 2019 and implemented his hardline agenda with a series of steps—such as dismembering India's only Muslim-majority state, Jammu and Kashmir, and introducing a citizenship law discriminating against Muslims—the Trump administration barely made any noise. On Trump's trip to New Delhi in 2020, even as the city burned in a days-long pogrom against Muslims triggered by BJP leaders, he did not utter a word.

When Biden succeeded Trump, it was thought that since his domestic constituency would expect him to ensure racial justice and repudiate white supremacy at home, he would find it hard to justify pandering to other kinds of supremacists abroad. If upholding democratic institutions was a priority at home, so would it be abroad. It was a false hope.

As Biden prioritized the looming contest with China and set out to win over US allies straining at the leash after four years of Trump, he zoomed in on 'democracy' as the magic glue to put together his team of 'good guys' against China and Russia. "This is a battle between the utility of democracies in the 21st century and autocracies," Biden said at his first press conference as president. "We've got to prove democracy works." Accepting that it wasn't working for some of America's so-called democratic allies would be acknowledging that the 'bad guys' were winning.

Geopolitically leveraging this ideological emphasis, in Asia his administration revived an informal alliance of four maritime democracies in the Asia-Pacific region comprising the United States, Australia, Japan and India—called the Quadrilateral Security Dialogue, or 'Quad'—that had been dead in the water for a decade. Biden got the leaders of this supposedly 'Asian NATO' to meet at a summit for the first time. It was just a day before the summit that the V-Dem Institute declared that it did not consider India a democracy anymore as it had turned into an "electoral autocracy."

Throughout Biden's four years, he wouldn't allow such inconvenient information to get in the way of America's relations with India. This was most evident during Modi's US visit in June 2023, when Washington laid out the red carpet for a man to whom it had denied a visa for a decade because of his role in a pogrom against Muslims in 2002. On that trip to Washington two years ago, Modi addressed a joint meeting of Congress—one of the few world leaders, alongside Winston Churchill and Nelson Mandela, to have had the privilege of doing it twice. 'Shared values' of democracy was a constant refrain to justify Modi's lavish treatment. Some 75 Democratic members of Congress wrote to Biden to urge him to raise human rights issues with Modi, but again, commercial and military relations overrode all such concerns.

Biden hailed Modi and touted the “limitless possibilities” of the US-India relationship. “Two great nations, two great friends, two great powers that can define the course of the 21st century,” he declared. Not just Biden—the bipartisan consensus for an all-in, pro-India policy was evident throughout Modi’s address to Congress as lawmakers from both sides of the aisle rose repeatedly to applaud him.

Modi’s 2023 speech saw 53 rounds of applause and 15 standing ovations, compared to 33 rounds of applause and 9 standing ovations when he first addressed the US Congress in 2016 under the Obama administration. In the seven intervening years, as India’s turn to illiberalism accelerated alarmingly under his watch, Modi’s popularity with US politicians had only grown.

Trump and Modi

There was no reason to expect it to be any different with Trump 2.0. In fact, the networks of transnational right-wing solidarities only make the bonds between Modi and Trump extra special. 9/11 and rising anxieties over Muslim immigration in the US and Europe have firmly centred today’s politics of hate on Islamophobia. This is where the extremely well-resourced Hindu far-right finds common ground with Western hate groups. India is now a major source of Islamophobic content on social media platforms globally and Indian far right groups are forging new alliances outside India.

The supremacist Hindu ideology of ‘Hindutva’ has spent decades embedding itself under the radar in the UK, Australia, the US and Canada with the help of a network of charities, think-tanks and influential public figures. Prominent white nationalists have been increasingly speaking out on Hindutva causes and attacking Islam while the Hindutva ecosystem echoes their anxieties about Islam and immigrants. In the mainstream polity, Hindutva money has been cultivating right-wing American leaders, most famously Tulsi Gabbard. The power of these right-wing connections is not fully understood and typically missed in commentaries on Indo-US relations.

From the very beginning, the much-touted Trump-Modi ‘bromance’ of the past seemed to offer little protection from Trump’s tariff tantrums, as he has repeatedly singled out India as a particularly nasty trading partner that uses high tariff barriers against the US.

It was connections like these that contributed to a particularly strong bonding between Modi and Trump in the latter’s first term. They hosted each other with lavish public rallies affirming their friendship. Unusually for a foreign leader, Modi publicly rooted for a Trump re-election, even coining a Hindi election slogan for his campaign.

But Trump 2.0 has been a different beast. From the very beginning, the much-touted Trump-Modi ‘bromance’ of the past seemed to offer little protection from Trump’s tariff tantrums, as he has repeatedly singled out India as a particularly nasty trading partner that uses high tariff barriers against the US. He ‘fixed’ that problem by imposing a 25% tariff on India—much higher than the 19% for Pakistan, Philippines and Indonesia, and the 15% on the EU, Korea, and Japan. And in early August he then went on to raise it to 50%.

Trump has suspended trade talks with India but hopes are still alive for a reversal of his hard stance if this, as some believe, is his opening gambit to clinch a better deal. It’s also in India’s interest to keep working on a deal as it is the one with a weaker hand and it needs the US for some of its biggest exports, namely pharmaceuticals and software, not to mention its need for cutting-edge defense equipment that the US provides. But even if the two reconcile and the tariff conditions are reversed at some point in the future, the very foundations of Indo-US partnership stand irreversibly damaged.

Strategic autonomy is an axiomatic baseline for India's foreign policy—and its people—and successive US administrations have respected this even as they have pursued a strong relationship. Trump doesn't seem to have any respect for such nuance. In his last term, Trump took Modi by surprise in the middle of an election campaign by suddenly barring India from buying Iranian oil. This time, he is going after both Russian and Iranian supplies. India's state refiners have reportedly paused Russian oil purchases under pressure, while six Indian companies have been sanctioned over Iranian oil purchases. In 2025 alone, India has more than doubled its oil imports from the United States at the cost of its traditional suppliers but still hasn't been able to placate Trump.

All this is terrible optics for Modi, whose supporters had been led to believe through steady propaganda that the world now respects a more powerful India under his leadership. Trump has been demolishing this notion almost on a daily basis since returning to power. Much to the horror of Indians, he started deporting illegal Indian immigrants, in chains and stuffed in military planes, as soon as took office. He has since asked tech firms to stop hiring Indians or manufacturing in India, has demanded India distance itself from BRICS, and has been pressuring India to open up its agriculture and dairy markets, threatening the country's all-important farm sector that employs nearly half of India's workforce.

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He has simultaneously deepened US relations with Pakistan just when India has ramped up its global outreach against Pakistan. In a major embarrassment to Modi, Trump has even said —about 30 times so far, by the opposition's count—that it was he who prevailed on India and Pakistan to stop their hostilities in May by using the carrot of more trade. The opposition is demanding to know why Modi chose commercial interests over national security—a damning insinuation for a politician whose calling card is muscular nationalism.

The long and short of it is that the much-trumpeted Indo-US friendship and partnership is in serious trouble. The US has begun to be seen in India as a treacherous ally. Trump's overlord-like demands have had the effect of rapidly eroding the public consensus of a pro-America policy built over recent decades and reviving old animosities towards the US. Beyond a rancorous opposition, even reasoned public opinion is turning increasingly hostile, demanding India cannot capitulate to what the public intellectual Pratap Bhanu Mehta describes as "imperialism on steroids." Trump's demands, he says, are less about commerce and more like an emperor demanding tributes from a vassal.

As Evan A. Feigenbaum, US deputy assistant secretary of state, who oversaw US-India ties in the George W. Bush administration, and currently a vice president at the Carnegie Endowment for International Peace, notes: "Remarkably, and for the first time in two decades, Trump's actions, statements, and coercive tone have made relations with the United States a combustible domestic political issue in India. The opposition, the media, and the Indian public have put the government on notice to avoid showing weakness in the face of Trump's threats."

In a throwback to the Cold War days, rumblings of anti-Americanism have begun to be felt at the highest levels. Right after Trump's latest tariff warning the Indian Army, took a dig at the US by sharing an old newspaper clipping from 1971 on American military support for Pakistan.

This may not be a temporary phase. The opposition may gloat at Modi's plight, but Trump's tantrums have ramifications beyond Modi. His behavior is creating room for a wider policy rethink and realignment of regional power. Trump's insulting coercion might have the effect of a long-term alienation stretching beyond his term as India's appetite for engaging with America and its democratic institutions wanes (even if they heal after the Trump years). That can only be bad news for India's democracy.

Trump and India's China option

Even before Trump returned to power, the possibility of the uncertainties if he did, along with other structural reasons, had already begun to push India towards a détente with China. A months-long fatal confrontation on their unresolved border in 2020 had pushed relations over the edge as India hit back with a series of trade curbs. These are now beginning to be reversed. Modi will visit China later this month, his first trip to the country in seven years. India has resumed issuing visas for Chinese nationals after nearly five years. New Delhi has even signalled openness to reviving the long-dormant Russia-India-China (RIC) trilateral dialogue.

One of the unintended consequences of Trump's second coming for India's fast declining democracy is the possibility of the changing geoeconomic options forcing India to build bridges with China, giving Modi even less reason to maintain democratic appearances and a strong hedge against Western sensitivities towards India's democratic crisis.

A generally deglobalizing trend means America increasingly brings less to the table for India. With Trump, even less. Meanwhile, China's dominance in global supply chains — it produces more than the next nine largest manufacturers combined — and its new status as a source of foreign direct investment (FDI) mean China has the capacity to play an important role in expanding India's industrial base. This fact is now openly acknowledged by the Indian government, whose recent policy blueprints have talked about the need to “plug India into China's supply chain,” and pursue a pragmatic approach focused on attracting Chinese FDI. The US, once a major source of FDI, is now competing with India for investment as it seeks to boost domestic manufacturing.

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Wrestling with jobless growth and high youth unemployment, India could use some of the outgoing Chinese FDI if US investments continue to turn inward; Trump recently warned Apple against expanding its India production base. Just when India had begun to take succour from its success in getting Apple to make most of its iPhones in India, in a significant shift away from China, Trump has forced Apple to invest \$100 billion to make iPhone parts in the US.

Apart from its economic rationale, normalizing ties with China may also be geopolitically expedient as it protects India in the event of a highly unlikely but not an entirely impossible scenario of a Sino-US grand bargain that would allow for a limited US retrenchment in Asia, leaving India in the lurch. Despite the tariff heat, Trump has been generally conciliatory towards China; while slapping tariffs on India and calling off trade negotiations, he has continued talks with China and indicated a tariff truce with the country may be extended. In the event of China and the US working out an understanding on the Asian sphere of influence, it would serve India well to be on better terms with China. The great Asian rapprochement would have far-reaching ramifications.

A brave new world

India and China share the same impatience with the existing global order, which both find West-centric. Trump's ascent in a way formalizes the destruction of the 'rules-based order' that was already evident in the closing months of Biden's term as he pandered to Netanyahu's bloodlust in Gaza. Despite all the grief Trump gives, in him Modi and China have an American leader who not only cares little for the liberal international order but who in fact deeply resents it.

For the first time in history, the world is thus looking at a scenario in which Russia, China and the US look equally interested in dismantling the liberal international order underpinned by democratic norms. The consequences for the 'world's biggest democracy', which has already begun to look like a central Asian dictatorship under a demagogue programmatically committed to wrecking India's inclusive democracy, could be calamitous.

Past US administrations, including Trump's, have treated Modi with kid gloves, both for India's still untapped market potential as well as for their convergent interest with India in countering China. Modi's neoliberal commitment has been an added attraction for American interests. This relationship has thus traditionally pivoted on geoeconomic interests even though dressed in the language of 'shared values' of democracy. If Modi's democratic lapses have ever embarrassed the White House, they were dealt with in private. For the world at least, India and the US have maintained a united front as defenders of a liberal world order in a supposed global battle between democracy and autocracy—an ideological code for America's quest to maintain global dominance by containing China. In his second term, Trump has upended these rules of engagement, pushing India, and Asia, into uncharted waters.

Having dropped all pretensions of democracy himself, Trump doesn't much care about the fundamental ideological framing of the Indo-US grouping, and has instead focused on the geoeconomic core of the relationship. Neither does he appear too concerned about China, unlike his predecessors. He is in fact believed to be open to a grand bargain with China as part of a broader America's retrenchment from the region. All of these pose major strategic problems for India. Because of fundamental changes in US policy and worldview, India now brings a lot less to the table for the US than before, and Trump expects Modi to make that up by prying open the Indian market much more than before.

And unlike his predecessors, Trump conducts his bargaining on social media—turning a delicate bilateral negotiation into the spectacle of a national extortion. The backlash in a country that takes pride in its strategic autonomy and whose colonial history makes it predisposed against anything resembling Western domineering, could be a turning point for India's relationship with the US. It creates a political climate for Modi to reset India's strategic involvement with the US and deepen ties with China and Russia, reducing India's engagement with Western democratic polity and institutions, and potentially deepening the democratic backsliding already under way.

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