

China ties — beware conciliation without deterrence

Political winds seem to be shifting, with India adopting a more conciliatory crouch towards China. In a podcast released in mid-March, Prime Minister Narendra Modi made his warmest comments about China in years, saying “only through dialogue can we build a stable, cooperative relationship”, which is “essential for global stability and prosperity”. Chinese officials lapped it up.

This has not come out of nowhere. India-China relations have been slowly recovering since they ruptured in 2020, when China launched multiple incursions across the Line of Actual Control, into Ladakh, and a skirmish killed 20 Indian soldiers. Military talks haltingly disengaged forces from many sites on the border. Despite a diplomatic freeze, bilateral trade grew to set new records. And less than six months ago, in October last year, India and China made a surprising deal to disengage their troops from the last two incursion sites. The crisis was nominally resolved, and the two countries were on the path toward normalisation.

On India's stance

It is not yet clear if Mr. Modi's comments were simply a new tone, or if they presage a substantive policy shift. New Delhi itself has probably not decided, and may just be keeping its options open. It may be returning to the more conciliatory approach of the earlier days of the Modi government, when New Delhi hoped to find a mutually-productive relationship, holding summits with China's President Xi Jinping to find areas of policy alignment. At the same time, the India-China rivalry is structural and abiding. Just days after Mr. Modi's podcast appearance, India's Chief of Defence Staff, General Anil Chauhan, met with senior commanders from India's Quad partners, Australia, Japan, and the United States.

India's grand strategy has always prioritised national economic development; from that perspective, India would be prudent to defuse military confrontations with its largest trading partner.

Indeed, China boasts an economy more than four times larger than India's. So, as India's



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External Affairs Minister S. Jaishankar has said bluntly, it is “common sense” for India to seek a stable and even profitable relationship with its giant neighbour.

The three body problem

New Delhi does not, however, make policy in a vacuum. The Modi government has doubtless been examining the new Trump administration closely, and recent signals from Washington suggest an ambiguous policy stance. Mr. Trump has followed through on his threat to impose tariffs on Beijing, but his toughness on trade does not seem to extend to defence policy. He wanly suggested that the United States and China (along with Russia) should slash defence spending in half. His nominee for the top policymaking job at the Pentagon, Elbridge Colby, demanded that frontline allies such as Japan – as well as Taiwan – should radically increase military spending and assume more responsibility for their own defence.

Apart from China, Mr. Trump has shown a predilection for orchestrating grand bargains with other great powers. His peace process for Ukraine involves accommodating Russian strategic interests, while delivering lavish commercial profits to the U.S. Mr. Trump has thus shown a willingness to suddenly reverse decades of policy, ceding a sphere of influence to America's erstwhile rival, Russia, for the sake of forging a 19th century-style compact among great powers. There is no logical impediment to Mr. Trump seeking a similar compact with America's other great power rival, China – trading away American strategic influence for mercantilist gain and an illusory peace.

More pointedly, Mr. Trump all but ceased support to Ukraine – even cutting off intelligence warnings of Russian missile attacks against civilians – to coerce Kyiv into submitting to a deal. America's European allies instantly lost faith in its decades-old security guarantees. Such wanton pressure tactics could not have escaped New Delhi's attention. India does not rely on American protection, but as former Indian Defence Secretary Giridhar Aramane admitted, it has come to expect U.S. assistance, especially

intelligence, in managing the Chinese threat on the border. Now, doubts over American support in a crisis, and even the slight possibility of a deal that strengthens China's position, add more reasons for India to stabilise its relationship with its powerful neighbour.

Sharpen the sword

With a new tone, and possibly a new conciliatory policy, some in New Delhi may be tempted to conclude that India can ease off on investing in military capabilities, or deepening military cooperation with partners. In fact the opposite is true. India's military preparations have been anaemic even despite the urgency imposed by the Ladakh crisis. Defence spending, as a share of the national budget and as a share of GDP, has steadily declined over the past decade.

The risk of a stabilisation policy is that it gives New Delhi an excuse to keep putting off overdue investments in modernisation or organisational reforms. That would play right in to Beijing's hands. For India to have military options in the future, it must invest in military power today. Military capabilities take inordinate time to field – as recent news stories have reiterated again and again, building submarines and developing fighter aircraft take years, if not decades.

In the interim, the Indian military should continue to pursue operational cooperation with its partners, regardless of Washington's unpredictability or New Delhi's tactical shifts in tone. Exercises in the field and on the high seas build interoperability and Indian capability. Further coordination of operations and plans can build Indian capability even more, without binding New Delhi or any of its partners to any particular policy.

Ultimately, the purpose of military power is to deter, and, if necessary, defeat aggression. Indian policymakers can expect more Chinese aggression in the future – just as they have endured for decades in the past, including after Mr. Modi's own summits with Mr. Xi. If India wants stability, it must accompany its conciliatory tone with the material capacity to deter aggression. Otherwise, stability risks turning into submission.