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EDITORIAL ANALYSIS

The Strength to Walk Straight: India Between an Assertive Beijing and an Unpredictable Washington

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CURATED & WRITTEN BY

Bharat Choudhary

UPSC Educator & Content Creator

linkedin.com/in/epicbharat

The Strength to Walk Straight: India Between an Assertive Beijing and an Unpredictable Washington

The Hindu 27 July 2026 GS2 GS3

INTERVIEW ANGLE

"If de-risking from Chinese inputs demonstrably raises costs for Indian manufacturers and slows exports for a decade, is that a price a developing economy can honestly justify paying?"

Every fact web-verified against primary sources

THE LIFT LINE

“We do not have to ‘tilt’ either way. We must, instead, develop the strength to walk straight.” That closing sentence carries the whole argument of Shashi Tharoor’s column in The Hindu of 27 July 2026. The piece rejects two counsels of despair: an unreciprocated economic embrace of Beijing dressed up as pragmatism, and anxious dependence on a Washington that has already shown its willingness to tariff, restrict and re-hyphenate. Strategic autonomy, on this reading, is not a posture chosen between two poles; it is a capability built at home.

WHY THIS EDITORIAL MATTERS FOR YOUR EXAM

The column is by **Shashi Tharoor**, fourth-term Lok Sabha Member of Parliament from Thiruvananthapuram and Chairman of the Parliamentary Standing Committee on External Affairs. Treat it as reasoned opinion with a declared political position, not as government policy, and use it the way examiners reward: as a well-argued position you can engage with, qualify and counter.

GS Paper 2: India and its neighbourhood; bilateral, regional and global groupings and agreements involving India; effect of the policies and politics of developed and developing countries on India’s interests; India’s relations with major powers; important international institutions and their mandate.

GS Paper 3: security challenges and their management in border areas; the role of external state actors in creating internal security challenges; changes in industrial policy and their effect on industrial growth; the mobilisation of resources; supply-chain and critical-mineral security.

For **Prelims**, hold the institutional specifics: the **Line of Actual Control (LAC)**; the **United Nations Security Council (UNSC)** veto and India's candidature for permanent membership; the **Nuclear Suppliers Group (NSG)**; and the post-2020 domestic instruments, namely the June 2020 prohibition of 59 Chinese mobile applications, **Press Note 3 of 2020**, which requires prior government approval for foreign direct investment (FDI) from countries sharing a land border with India, and the effective exclusion of Chinese vendors from India's fifth-generation (5G) telecom rollout.

BACKGROUND AND CONTEXT

The column opens on a real anxiety. A volatile political climate in Washington has unsettled New Delhi: the United States administration imposed punitive tariffs on Indian steel and aluminium, withdrew preferential trade access, aggressively renewed its ties with Islamabad, and tightened H-1B visa rules. On 24 July 2026 a fresh **10 per cent duty over the Most Favoured Nation (MFN) rate** took effect on Indian goods under **Section 301 of the United States Trade Act, 1974**. Out of that anxiety has grown a domestic chorus, led by an influential business lobby, calling for a fundamental reset of India's China policy.

The reset case is not frivolous, and the numbers behind it are real. China displaced the United States as India's largest trading partner in 2025-26, and the composition of that trade is the problem: India's exports to China grew fast from a small base, while imports of machinery, components, active pharmaceutical ingredients and electronics grew from a very large one.

PARAMETER	POSITION AS OF JULY 2026
Bilateral trade, 2025-26	About **151.1 billion US dollars**; China became India's largest trading partner
India's exports to China, 2025-26	About **19.47 billion US dollars**, up **36.66 per cent**
India's imports from China, 2025-26	About **131.63 billion US dollars**, up about **16 per cent**
Trade deficit with China	About **112 billion US dollars**, an all-time high, against 99.2 billion in 2024-25
Border management	Patrolling understanding of **October 2024**; disengagement at Depsang and Demchok completed **30 October 2024**
China's share of Pakistan's arms imports	About **81 per cent** for 2021-25 (SIPRI, March 2026), up from 74 per cent in 2016-20
China's arms exports going to Pakistan	About **61 per cent**, though China supplied major arms to 47 states in the same period
Domestic response, minerals	**National Critical Mineral Mission**, approved January 2025, outlay **34,300 crore rupees** over seven years
Domestic response, magnets	Rare earth permanent magnet scheme, approved November 2025, **7,280 crore rupees** (6,450 crore in sales-linked incentives, 750 crore capital subsidy) for **6,000 tonnes per annum** of capacity

THE CORE ARGUMENT / ISSUE

The reset lobby's case, stated at its strongest

The column concedes the lobby a fair hearing, and an answer must too. Its argument runs in three moves. First, India's confrontational posture towards Beijing was over-synchronised with Washington's containment agenda rather than calibrated to India's own national interest. Second, India is deeply reliant on Chinese technology, supply chains, industrial inputs and capital, so a dogmatic anti-China stance stymies domestic growth while barely denting Beijing. Third, Washington's pattern of tactical flip-flops risks leaving an overextended India exposed to Chinese retaliation without a guarantor.

Tharoor's reply: the warning is right, the prescription is wrong

Tharoor accepts the first half. The warning against subordinating Indian interests to an unpredictable Washington is valid, though he questions whether that subordination is actually occurring. What he rejects is the proposed alternative. A hasty, unreciprocated economic embrace of China, he argues, mistakes tactical business convenience for long-term national security: it ignores a decade of unprovoked hostility, deepens an already asymmetric dependency, and strips India of the leverage it accumulated painfully.

A decade read as strategy, not as accidents

EPISODE	YEAR	WHAT IT SIGNALLED
Depsang incursion	2013	Testing Indian resolve on the LAC
Chumar standoff	2014	Pressure timed to high-level diplomacy
Doklam standoff	2017	Coercion extended to a third-country tri-junction
Galwan Valley clashes	2020	**20 Indian soldiers killed**; Chinese casualties never officially confirmed by Beijing

To these the column adds salami-slicing attempts to alter the LAC, the assertion of claims over the entire State of **Arunachal Pradesh**, which is an integral part of India, the renaming of geographical features within it, and the issuing of stapled visas to residents of **Jammu and Kashmir** and Arunachal Pradesh, a device intended to weaponise India's internal geography and to cast settled Indian territory as disputed.

On the economic side, China has withheld critical machinery and industrial inputs and weaponised its near-monopoly over **rare earths** and **tunnel-boring machines** during bilateral disputes. The pattern is instructive because it is deniable: no announcement is made, licences simply slow down. Beijing lifted several curbs on rare earth magnets, fertiliser and tunnel-boring machines for India in August 2025 after diplomatic engagement, but the broader architecture of export controls over rare earth processing technology remained. That is precisely the point. A lever that can be released can be pulled again.

Most consequentially, the column points to Beijing's coordinated military support for Pakistan during **Operation Sindoor in May 2025**, India's response to the Pahalgam terror attack of 22 April 2025. Indian defence officials have publicly described real-time intelligence, satellite coverage repositioned over Indian movements, and assistance to Pakistan's radar and air-defence posture. **Lieutenant General Rahul R. Singh**, Deputy Chief of Army Staff (Capability Development and Sustenance), told a FICCI event on **4 July 2025** that "Pakistan was the front face. We had China providing all possible support." That converts China from a supplier of hardware into an active participant in Pakistan's security architecture directed against India.

The myth of reciprocity

The foundational tenet of Chinese policy in Asia, the column contends, is a unipolar continent; Beijing does not regard New Delhi as a peer, and therefore does not reciprocate. The evidence offered is institutional rather than rhetorical. China has used its **UNSC veto** to shield Pakistan-based terrorist organisations from designation under the Council's sanctions regime, and has blocked India's aspirations for permanent UNSC membership and for entry into the **NSG**, the latter on the procedural argument that India is not a signatory to the Nuclear Non-Proliferation Treaty (NPT). On market access, Indian pharmaceutical, agricultural and information-technology exports have faced persistent non-tariff barriers even as Chinese manufactured goods entered India freely, which is why a 36 per cent rise in Indian exports still leaves a deficit above 100 billion dollars.

With an annual trade surplus over India exceeding **100 billion US dollars**, opening the floodgates further would hand Beijing an economic kill-switch, since cutting off critical components in a crisis could paralyse Indian industry at exactly the moment India could least afford it. The 2020-21 experience with active pharmaceutical ingredients and the 2025 experience with rare earth magnets are not hypotheticals; they are rehearsals.

The border logic follows from the same reading. China respects power and exploits vulnerability. If India surrenders economic leverage voluntarily, Beijing concludes that multi-domain pressure works, bides its time, and eventually dictates terms on a permanent boundary settlement from a position of dominance. On this reading the post-Galwan restrictions were instruments of diplomatic leverage rather than emotional reactions, and dismantling them for marginal economic relief would amount to unilateral disarmament before a negotiation that has not yet begun.

Washington is a partner, not a guarantor

The column is equally blunt about the other pole. Relying entirely on the United States as a security guarantor is unwise, however warm the enthusiasm of its ambassador in New Delhi, **Sergio Gor**, who presented his credentials on **14 January 2026**. Washington will prioritise its own calculations, and on the heights of Ladakh India stands alone. But realising that Washington is unreliable is not an argument for running into the arms of an actively hostile neighbour. There is, Tharoor insists, immense strategic space between subordination to the United States and unconditional surrender to China, and that space is called strategic autonomy.

HOW TO THINK ABOUT THIS (ANALYTICAL FRAME)

Carry a **Leverage Ledger** into the exam hall and run any de-risking proposal through three questions.

1. **Is the dependence symmetric or asymmetric?** Trade that both sides would miss equally is interdependence, and interdependence is stabilising. Trade in which one side controls a chokepoint input, such as rare earth magnets, tunnel-boring machines or active pharmaceutical ingredients, is dependence, and dependence is coercible. Only the second kind needs urgent policy attention, which is why a headline trade deficit is a poor guide to strategic risk.
2. **Is the concession reciprocated or unilateral?** A restriction lifted in exchange for market access, technology transfer or a verifiable border assurance is diplomacy. The same restriction lifted for nothing surrenders an asset that cannot easily be rebuilt, because rebuilding it a second time carries a far higher political and commercial cost.

3. **What does the alternative cost, and over what horizon?** Diversification and domestic capacity carry real short-term inflationary and competitiveness costs, and an honest answer prices them in rather than pretending resilience is free. It then argues that a decade of higher input prices is cheaper than a single crisis in which supply is switched off at the moment of maximum need.

THE DIAGRAM IN WORDS

Picture India at the centre of a triangle it did not choose. On the northern vertex sits China, joined to India by a thick arrow of imports running one way, a thin arrow of exports running back, and a second thick arrow running sideways to Pakistan carrying weapons, satellite data and diplomatic cover at the UNSC; that sideways arrow is what turns a bilateral rivalry into a two-front problem. On the western vertex sits the United States, joined by arrows of technology, defence cooperation and market access that are genuinely valuable but visibly conditional, and by a tariff arrow pointing inward. The third vertex is empty, and that emptiness is the argument: it must be filled by India's own manufacturing base, its own mineral supply chains, and its own diversified trade partners in Europe, East Asia, West Asia and the Global South. The two visible arrows are levers held by others; only what India builds in the empty vertex is a lever held by India.

WAY FORWARD

1. **Separate stabilisation from surrender.** Restore flights, visas and diplomatic bandwidth with China, because managed rivalry is safer than unmanaged rivalry, but keep Press Note 3 and the telecom exclusions in place as bargaining assets to be traded for something, not given away for goodwill.
2. **Attack the chokepoints, not the trade balance.** Concentrate scarce capital on the inputs where a single supplier can halt Indian production, using the National Critical Mineral Mission, the rare earth permanent magnet scheme, the rare earth corridors announced in the Union Budget 2026-27 for Odisha, Kerala, Andhra Pradesh and Tamil Nadu, and the critical-mineral partnerships India is building with resource-holding countries including Myanmar.
3. **Diversify the export map.** Use the India-United Kingdom Comprehensive Economic and Trade Agreement (CETA), in force since 15 July 2026, and push the India-European Union agreement signed on 27 January 2026 through ratification, so that no single market can price India's foreign policy.
4. **Fund deterrence, not declarations.** Sustain border infrastructure, surveillance and integrated capability in Ladakh and the eastern sector, because the column's central claim, that Beijing reads weakness as invitation, is a claim about capability rather than rhetoric, and capability is a budget line before it is a speech.

5. **Be honest about the transition cost.** Manufacturing built under protection raises prices before it lowers them, so the political case must be made openly, with sunset clauses and competitiveness benchmarks, or import substitution will calcify into permanent inefficiency.
6. **Keep the American relationship without leaning on it.** Deepen technology, defence and trade cooperation with Washington while negotiating the Section 301 duty and the bilateral trade agreement, on the settled understanding that partnership is not protection, and that no external power will defend an interest India is unwilling to defend itself.

PYQ LINKAGE AND PRACTICE

UPSC has repeatedly examined India's China policy, the durability of strategic autonomy amid great-power competition, and the security implications of the China-Pakistan relationship, including questions on the "String of Pearls", on India's balancing among major powers, and on the economic dimensions of national security. This column is unusually useful because it supplies both the argument and its strongest counter-argument in the same text, which is exactly the structure a high-scoring Mains answer needs: state the reset case fairly, test it against the record, then resolve.

Practice question: "Reducing economic dependence on an adversary is a security decision before it is an economic one." Critically examine this proposition with reference to India's trade and technology relationship with China, and assess whether India's post-2020 restrictions have delivered strategic leverage. (250 words, 15 marks)

Interview angle: If de-risking from Chinese inputs demonstrably raises costs for Indian manufacturers and slows exports for a decade, is that a price a developing economy can honestly justify paying?

Sources: The Hindu, Ministry of External Affairs, Press Information Bureau, Ministry of Commerce and Industry

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CURATED & WRITTEN BY

Bharat Choudhary

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