

Navigating the U.S. Strategic Interests in South Asia Amid Global Shifts: Critical Appraisal of Second Tenure of Donald Trump

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Abstract

Donald Trump's re-election as the 47th President of the United States (U.S.) in January 2025 has reshaped the U.S. foreign policy in South Asia. This paper addresses two key research questions: i. How has Trump's "America First" agenda redefined the U.S. engagement with India, Pakistan, and Afghanistan? ii. What strategic space has emerged for Pakistan within this evolving framework? Grounded in realist theory and strategic pragmatism, the paper analyses how shifting alliances reflect transactional, interest-based diplomacy. In early 2025, the U.S. reinforced defence and trade ties with India through expanded military exercises and the revival of the "Mission 500" economic roadmap. Yet, Pakistan's position also evolved. Trump publicly praised Pakistan's counterterrorism cooperation and engaged directly during the March 2025 India-Pakistan border crisis, crediting Islamabad's willingness to allow international scrutiny — a move that elevated Pakistan's credibility without undermining U.S.-India ties. These developments suggest a calibrated dual-track approach: affirming India as a strategic counterweight to China, while recognising Pakistan's utility in regional stability and crisis management. Afghanistan, meanwhile, remains excluded from the U.S. strategic priorities, with continued non-recognition of the Taliban regime. This paper argues that Trump's second-term South Asia policy reflects selective and transactional engagement with implications for regional power balances.

Keywords: Regional Security, Asia Pacific, South Asia, Pak-U.S. Relations, Transactional Diplomacy.

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Introduction

Donald Trump's re-election as the 47th president of the United States (U.S.) marks a critical turning point in the U.S. foreign policy towards South Asia. Within the initial months of his second term, notable changes have begun to reshape the region's alliance, strategic rivalries and economic alignments. With the complex dynamics of South Asia in general and India, Pakistan, and Afghanistan in particular — the region holds pivotal position in the U.S.-China competition for global dominance. Trump's re-election and his administration's well-known emphasis on 'America First' apparently signals a continuation of transactional diplomacy and selective engagement in the region, with implications for regional stability and global power dynamics.

Trump's foreign policy, building on patterns established during his first term, has thus far combined continuity with calculated shifts — prioritising the protection of the U.S. strategic interests while intensifying efforts to counter China's regional and global assertiveness.¹ The Free and Open Indo-Pacific (FOIP) Strategy, introduced by the Trump administration in 2017, remains central to the U.S. engagement in South Asia during his second term. Grounded in a rule-based order, the strategy seeks to counter China's expanding economic and military influence. At its core is the U.S.–India partnership, which Trump continues to frame as essential to containing Beijing. India's strategic location, growing defense ties with Washington, and opposition to China's Belt and Road Initiative have solidified its role in advancing the U.S. objectives across the Asia-Pacific region.²

For Pakistan, recent developments under Trump's second term present a mix of risks and strategic openings. During his first presidency, the U.S. approach to Pakistan was largely transactional, anchored in counterterrorism cooperation but devoid of substantial economic or

¹ "Trump's 'America First' Foreign Policy Will Accelerate China's Push for Global Leadership | Chatham House – International Affairs Think Tank," November 14, 2024, <https://www.chathamhouse.org/2024/11/trumps-america-first-foreign-policy-will-accelerate-chinas-push-global-leadership>.

² Maryam Shahbaz et al., "Indo-American Relations during Donald Trump Era: Implications for Pakistan," *Global Political Review* IX, no. III (2024): 09-20, [https://doi.org/10.31703/gpr.2024\(IX-III\).02](https://doi.org/10.31703/gpr.2024(IX-III).02).

strategic incentives.³ This imbalance accelerated Pakistan's alignment with China, especially in military procurement and infrastructure investments under the China–Pakistan Economic Corridor (CPEC), aimed at countering perceived Indian hegemony in the region.

However, unlike early expectations of further diplomatic marginalisation, the trajectory of U.S.–Pakistan relations in 2025 has been more nuanced. In March 2025, following a major cross-border escalation between India and Pakistan, President Trump assumed a visible mediatory role.⁴ While India publicly dismissed third-party involvement, Trump's backchannel diplomacy was acknowledged by Islamabad and key international actors as instrumental in de-escalating the crisis. Pakistan's decision to allow international observers to investigate the Pulwama attack — contrasted by India's refusal — earned it rare bipartisan praise in Washington.

In March 2025, Trump commended Pakistan's counterterrorism cooperation during his address to Congress, citing “genuine progress in rooting out violent extremism.”⁵ Subsequently he met with Pakistan's Chief of Army Staff, General Asim Munir, in a closed-door session at Camp David — signalling a willingness to explore calibrated re-engagement on regional security issues.⁶ These developments suggest that while Pakistan may not be a strategic priority, it is no longer sidelined. Instead, it is being repositioned as a useful actor in crisis management and regional stabilisation — provided it aligns with the U.S. tactical interests.

Nevertheless, structural imbalances persist. The administration continues to prioritise India as a long-term strategic partner under the Free

³ Diana Nerozzi, “Trump Says India, Pakistan Agree to Cease-Fire after Talks Mediated by U.S.,” *NYPPost*, May 10, 2025, <https://nypost.com/2025/05/10/us-news/trump-says-india-pakistan-agree-to-cease-fire-after-talks-mediated-by-us/>

⁴ Diana Nerozzi, “Trump Says India, Pakistan Agree to Cease-Fire after Talks Mediated by U.S.”

⁵ Zia ur Rehman, “Pakistan Needs Support Fighting Terrorism. A Happy Trump Could Help,” *The New York Times*, March 5, 2025, <https://www.nytimes.com/2025/03/05/world/asia/trump-pakistan-kabul-airport-attack.html>.

⁶ “Trump, COAS Munir Talk Counterterrorism and Trade in ‘Cordial’ Meeting,” *Dawn*, June 19, 2025, DAWN.COM, <https://www.dawn.com/news/1918093>

and Open Indo-Pacific (FOIP) Strategy.⁷ Military cooperation has deepened through continued implementation of foundational agreements such as COMCASA (2018), enhanced intelligence sharing, and expanded naval exercises.⁸ The U.S. vision of India as a counterweight to China remains intact and central to Washington's Indo-Pacific calculus.

On Afghanistan, the Trump administration has shown no intention of policy revision. The second term has so far maintained a policy of strict non-recognition of the Taliban regime, continuing the disengagement trajectory initiated with the 2020 Doha Agreement.⁹ While the original withdrawal was rationalised as a move toward ending “forever wars,” the current stance reflects an ongoing reluctance to commit to state-building or post-conflict stabilisation in Afghanistan.¹⁰ Trump's foreign policy, consistent with neorealist logic, remains grounded in cost-benefit analysis rather than normative commitments to peacebuilding.

The second Trump presidency has thus far amplified pre-existing strategic patterns: i. selective engagement, ii. transactional diplomacy, and iii. bilateralism. Pakistan continues to receive limited but pointed recognition for its utility in counterterrorism and crisis mediation, while India retains its elevated status as a strategic hedge against China. These asymmetries are not incidental — they reflect the neorealist view that alliances are contingent and power-driven, not built on ideological alignment.

The broader regional impact of these policies is profound. South Asia's geopolitical architecture is becoming increasingly polarised, with

⁷ Wei Zongyou, “The Trump 2.0 Administration's Indo-Pacific Strategy — U.S.-China Perception Monitor,” *U.S. China Perception Monitor*, <https://uscnpm.org/2025/06/24/the-trump-administrations-indo-pacific-strategy/>.

⁸ “Indo-U.S. Defence and Security Cooperation: Interest-Based To Long-Term Strategic Partnership,” BRI, *Indus International Research Foundation*, July 10, 2025, <https://indusresearch.in/indo-us-defence-and-security-cooperation-interest-based-to-long-term-strategic-partnership/>

⁹ James Cunningham and Annie Pforzheimer, “Afghanistan Two Years after the Taliban Take-Over,” *The Jerusalem Strategic Tribune*, August 24, 2023, <https://static.jstribune.com/afghanistan-two-years-after-the-taliban-take-over/>.

¹⁰ Philip A. Berry, “How Trump the ‘Master Deal-Maker’ Failed When It Came to Negotiating with the Taliban in Afghanistan,” *The Conversation*, February 26, 2025, <http://theconversation.com/how-trump-the-master-deal-maker-failed-when-it-came-to-negotiating-with-the-taliban-in-afghanistan-250835>

Pakistan deepening ties with China, and India consolidating its strategic partnership with the U.S. This evolving balance raises critical questions: Can Washington sustain regional stability while privileging short-term strategic advantages? Will the FOIP strategy remain a deterrence mechanism, or harden into a more overt containment axis against China? And most importantly, can Pakistan leverage its emerging diplomatic relevance into longer-term strategic gains?

Strategic Partnerships and the Indo-U.S. Engagement Under Trump

U.S.-India Strategic Convergence in the Trump's First Term

During the President Donald Trump's first presidency, Indo-U.S. defence cooperation reached unprecedented levels, driven by shared concerns over China's growing influence in the Asia Pacific region. A pivotal moment in this partnership was India's designation as a Major Defence Partner in 2016.¹¹ This status granted expedited access to advance the U.S. defence technologies previously unavailable to New Delhi, laying the groundwork for significant defence collaborations. For instance, in 2020, India finalised a US\$3 billion deal for military helicopters and advanced systems, highlighting the deepening strategic ties between the two nations.¹² The ongoing emphasis on strengthening Indo-U.S. defence ties, particularly under Trump's second term, highlights India's growing strategic importance in the U.S. defence planning. This is especially evident in the efforts to counter regional threats in the Asia Pacific.

The Indo-U.S. partnership was further bolstered by foundational agreements that deepened military and technological collaboration. Notable among these was the Communications Compatibility and Security Agreement (COMCASA), which enabled securing real-time information

¹¹ Michael J Mazarr et al., *Security Cooperation in a Strategic Competition*, 2022, https://www.rand.org/content/dam/rand/pubs/research_reports/RRA600/RRA650-1/RAND_RRA650-1.pdf.

¹² *Conference Proceedings on Indian and U.S. Security Cooperation: Defense Production, Indo-Pacific Region, and Afghanistan* (RAND Corporation, 2023), <https://doi.org/10.7249/CFA2613-1>

sharing and enhanced interoperability between the two militaries.¹³ The Logistics Exchange Memorandum of Agreement (LEMOA) facilitated reciprocal access to military bases for logistics and refuelling, improving operational flexibility.¹⁴ Another key agreement, the Basic Exchange and Cooperation Agreement (BECA), allowed geospatial intelligence sharing, enhancing India's precision in military operations.¹⁵ These agreements streamlined defence procurement and elevated operational coordination, positioning India as a critical counterweight to China's influence in the Asia Pacific region.

This momentum in Indo-U.S. defence relations was visibly reaffirmed during the Modi-Trump summit in February 2025, where both sides emphasised expanding cooperation in advanced military technologies, including drone systems, missile defence, and cybersecurity. The joint communiqué highlighted deeper interoperability and co-production under the Defence Technology and Trade Initiative (DTTI). These initiatives reflect continuity with earlier strategic designations — such as Trump's 2017 description of India as a “pillar of stability” in the Asia-Pacific — and mark a shift from transactional defence sales toward long-term strategic integration.¹⁶ Forecasts by the Policy Circle Bureau (November 2024) regarding acceleration in high-tech defence collaboration have already begun to materialise in this renewed bilateral agenda.¹⁷

One of the most anticipated developments is the U.S.-India Initiative on Critical and Emerging Technologies (CET) which aims to foster collaboration in semiconductor technology, sustainable agriculture, clean

¹³ Imran Khurshid, “Navigating Strategic Waters: India-U.S. Foundational Defence Agreements and the Quest for Strategic Autonomy,” *Australian Journal of Maritime & Ocean Affairs* 0, no. 0 (n.d.): 1-19, <https://doi.org/10.1080/18366503.2024.2426860>.

¹⁴ Khurshid, “Navigating Strategic Waters.”

¹⁵ Samran Ali, “Indo-U.S. Foundational Agreements: Contributing to India's Military Capabilities,” *Centre*, no. No 18 (December 2020), <https://cscr.pk/pdf/perspectives/Indo-US-Foundational-Agreements-Contributing-to-India%E2%80%99s-Military-Capabilities.pdf>.

¹⁶ “India, U.S. Pledge to Maintain Peace across Indo-Pacific Region,” *Indian Express*, August 15, 2017, <https://indianexpress.com/article/india/modi-trump-agree-to-enhance-peace-across-indo-pacific-region-4798156/>

¹⁷ Policy Circle Bureau, *Trump 2.0: India's Strategic Gains and Economic Challenges* / Policy Circle, Economy, November 7, 2024, <https://www.policycircle.org/economy/what-trump-win-means-for-india/>.

energy, and other critical technologies.¹⁸ While joint production of advanced technologies is a broader goal of the U.S.-India defence cooperation, the iCET focuses on developing resilient technologies to counter state and non-state threats. By focusing on these high-tech collaborations, the U.S. and India hope to strengthen their strategic alignment and enhance their ability to counter China's growing presence in the region.

The growing synergy in defence cooperation has also sparked discussions about future agreements to solidify the partnership further. The Reciprocal Defence Procurement (RDP) agreement is gaining attention as a potential next step.¹⁹ This agreement, currently under consultation by the U.S. Department of Defence aims to enhance defence procurement cooperation by streamlining processes and facilitating trade in defence goods and services between the two nations. If finalised, it would complement the existing frameworks of LEMOA, COMCASA, and BECA, creating a more robust and interconnected defence partnership.

The deepening strategic alignment between the U.S. and India, particularly in defence cooperation, has significant implications for the broader South Asian region. For Pakistan, these developments are a source of growing strategic insecurity. The unprecedented access granted to India under agreements like COMCASA, LEMOA, and BECA has significantly enhanced New Delhi's military capabilities, enabling it to undertake more precise and advanced military operations. This growing asymmetry has increased Pakistan's sense of vulnerability, compelling it to divert resources toward military spending at the expense of critical domestic priorities, such as economic development and social welfare.²⁰ The

¹⁸ "The U.S.-India Initiative on Critical and Emerging Technology (iCET) from 2022 to 2025: Assessment, Learnings, and the Way Forward," Carnegie Endowment for International Peace, <https://carnegieendowment.org/research/2024/10/the-us-india-initiative-on-critical-and-emerging-technology-icet-from-2022-to-2025-assessment-learnings-and-the-way-forward?lang=en>.

¹⁹ "Negotiation of a Reciprocal Defense Procurement Agreement with the Republic of India," Federal Register, October 10, 2023, <https://www.federalregister.gov/documents/2023/10/10/2023-22429/negotiation-of-a-reciprocal-defense-procurement-agreement-with-the-republic-of-india>.

²⁰ Muhammad Ahmed Khan, "India-U.S. Strategic Convergence: Implications for Strategic Balance in South Asia," *NDU Journal*, 2023, <https://doi.org/10.54690/ndujournal.37.153>

resulting imbalance further reduces the incentive for dialogue between India and Pakistan. New Delhi's enhanced capabilities and international backing embolden it to adopt a more assertive stance, particularly on contentious issues like Jammu and Kashmir dispute.

However, this alignment is not without complications. Despite strategic cooperation, U.S.-India trade relations remain contentious. Trump's earlier term saw tariff hikes and the suspension of India's GSP status.²¹ As of mid-2025, the two countries are still negotiating a comprehensive trade deal, reflecting unresolved tensions on tariffs, market access, and digital taxation — highlighting the limits of convergence in the bilateral relationship.²²

The Quad: Advancing Collective Security in the Asia-Pacific

During the former Trump term, the Quadrilateral Security Dialogue (Quad) — a strategic forum comprising the U.S., India, Japan, and Australia — gained renewed momentum as a platform to address shared concerns over China's expansionism. Originally, initiated in 2007 and reestablished in 2017 after a decade-long hiatus, the Quad aims to promote a free, open, and rules-based Indo-Pacific order.²³ Trump's leadership invigorated the partnership among the Quad members by emphasising joint military exercises, enhanced intelligence sharing and coordinated security strategies.²⁴ These initiatives aimed to strengthen the Asia Pacific security architecture and counterbalance China's growing influence. The Quad's growing prominence during Trump's first term laid the

²¹ Ankit Panda, "Trump Announces Decision to Revoke India's 'Developing Country' GSP Status," March 5, 2019, <https://thediplomat.com/2019/03/trump-announces-decision-to-revoke-indias-developing-country-gsp-status/>.

²² Daniel Desrochers and Megan Messerly, "Trump Won't Let Other Countries Score Big 'Wins' in Trade Talks. Both Sides Could Lose," *POLITICO*, June 29, 2025, <https://www.politico.com/news/2025/06/29/us-india-trade-deal-00430438>

²³ Meenakshi Bansal, "Emergence of The QUAD by Meenakshi Bansal – International Association for Political Science Students," The International Association for Political Science Students, April 19, 2021, <https://iapss.org/emergence-of-the-quad-by-meenakshi-bansal/>.

²⁴ Laura van der Hoeven, "Trump's Second Term and the Future of the Quad," November 06, 2024, <https://thediplomat.com/2024/11/trumps-second-term-and-the-future-of-the-quad/>.

groundwork for deeper cooperation in his second term when defence and security collaboration among the four nations is expected to intensify further.

From 2020 to 2025, the Quad continued to evolve with significant milestones, including the first-ever Quad Leaders Summit in March 2021, emphasising cooperation on critical issues like vaccine distribution and climate change.²⁵ The Quad also conducted joint naval exercises, such as the Malabar Exercise, to enhance maritime security capabilities.²⁶

On January 22, 2025, U.S. Secretary of State Marco Rubio hosted the foreign ministers of Australia, India, and Japan in Washington for the new administration's first significant diplomatic engagement.²⁷ This meeting reaffirmed the Quad's importance as a mechanism for advancing collective security and signalled the Trump administration's intent to prioritise the Asia Pacific in its foreign policy agenda. Experts at the Stimson Centre have noted that the Quad's evolution into a critical mechanism for defence collaboration reflects a shared resolve to address China's increasing assertiveness while enhancing India's position as a regional net security provider.²⁸

Joint military exercises and collaborative initiatives within the Quad framework are expected to continue expanding in Trump's second term, too. These efforts strengthen India's strategic position and deepen its integration into a multilateral security network.²⁹ As the U.S.-China tensions over issues like the South China Sea and advanced technological competition escalate,

²⁵ Joseph Stepansky, "What to Watch as Indo-Pacific 'Quad' Leaders Meet for First Time," *Al Jazeera*, March 11, 2021, <https://www.aljazeera.com/news/2021/3/11/what-to-watch-as-indo-pacific-quad-leaders-meet-for-first-time>.

²⁶ "The Future of the Quad and the Emerging Architecture in the Indo-Pacific | German Marshall Fund of the United States," <https://www.gmfus.org/news/future-quad-and-emerging-architecture-indo-pacific>.

²⁷ Oscar Grenfell, "Rubio Hosts Quad Meeting with Japan, India and Australia, Directed against China," *World Socialist Web Site*, January 23, 2025, <https://www.wsws.org/en/articles/2025/01/24/wnyq-j24.html>

²⁸ C. G., "An Evolving Agenda for the Quad • Stimson Center," *Stimson Center*, June 7, 2022, <https://www.stimson.org/2022/an-evolving-agenda-for-the-quad/>.

²⁹ "Trump 2.0 Will See Stronger U.S. Security Ties with India," *Orfonline.Org*, <https://www.orfonline.org/research/trump-2-0-will-see-stronger-us-security-ties-with-india>.

India's participation in the Quad has become increasingly significant in maintaining the balance of power in the Asia Pacific. Furthermore, intelligence sharing, advanced defence collaboration, and regional capacity-building initiatives further consolidate the Quad's role in safeguarding regional stability.

However, the growing prominence of the Quad has profound implications for Pakistan's security landscape because it enhances India's military capabilities and strategic influence in the region. This development complicates Pakistan's security calculus as India, supported by the Quad members, strengthens its naval and military presence, potentially disrupting the regional balance of power. Historically, Pakistan has faced challenges due to India's naval strength, such as during the Indo-Pak Naval War of 1971, where Indian missile boat attacks severely damaged Karachi's port facilities.³⁰ More recently, incidents like the detection of Indian submarines by Pakistan in 2016 and 2019 highlight ongoing tensions between the two navies.³¹ While not explicitly aimed at isolating Pakistan, the Quad's activities contribute to a broader regional dynamic in which India's strategic partnerships bolster its position. This necessitates Pakistan navigating its relationships with China and other regional actors carefully to maintain its security interests.

Moreover, as the Quad continues to focus on countering China's influence, Pakistan's close partnership with Beijing, mainly through the CPEC, is increasingly viewed through a competitive lens. This dynamic complicates Islamabad's strategic calculus, as it must balance its reliance on China with the risks of regional polarisation. The resultant environment of mistrust and competition heightens Pakistan's sense of vulnerability and underscores the risk of South Asia becoming entangled in the broader Asia-Pacific contestation. As a result, the polarisation of regional alliances diminishes prospects for dialogue and stability, leaving South Asia at greater risk of instability amidst escalating tensions between global powers.

³⁰ "Assessing Pakistan's Naval Modernisation," Orfonline.Org, <https://www.orfonline.org/english/research/assessing-pakistans-naval-modernisation>

³¹ "Detected and Blocked' Indian Submarine Incursion: Pakistan Army," *Al Jazeera*, October 19, 2021, <https://www.aljazeera.com/news/2021/10/19/pakistan-army-claims-detected-blocked-india-submarine-incursion>

U.S.-Pakistan Relations in Trump's Second Term: Challenges and Realignments

Pak-U.S. Relations During Trump's First Presidency

During Donald Trump's first term, the trajectory of the Pak-U.S. relations underwent a significant shift. What began as strained ties evolved into a transactional framework, a shift that ultimately disadvantaged Pakistan and left it vulnerable to both American pressure and Indian aggression. Trump's administration initially took a punitive stance, portraying Pakistan as the primary instigator of regional instability. This was underscored in January 2018 when Trump publicly accused Pakistan of 'lies and deceit,' alleging that Islamabad harboured terrorist groups while benefiting from the US financial aid.³² Such accusations, viewed by many as unjust, have significantly impacted the Pak-U.S. relations.

The narrative around Pakistan's role in counterterrorism often fails to acknowledge Islamabad's significant sacrifices and achievements. Pakistan has made substantial strides in combating terrorism, as demonstrated by its comprehensive counterterrorism operations like *Zarb-e-Azb* and *Khyber-IV*, which led to a decrease in terrorist attacks and casualties.³³ These efforts, often overlooked, deserve the utmost respect. However, the suspension of the U.S. security assistance to Pakistan, amounting to US\$1.3 billion, had profound economic implications and underscored the intricate nature of regional dynamics.³⁴ This decision coincided with escalating tensions with India, which were exacerbated by incidents like the Pulwama attack in 2019 and subsequent military escalations.

For instance, during the 2019 Balakot airstrikes, which were a response to the Pulwama attack, the U.S. failed to intervene or condemn India's

³² "Double Game: Why Pakistan Supports Militants and Resists U.S. Pressure to Stop," Cato Institute, September 20, 2018, <https://www.cato.org/policy-analysis/double-game-why-pakistan-supports-militants-resists-us-pressure-stop>

³³ "Pakistan's Counterterrorism Strategy: Beyond Azm-e-Istehkam," *RUSI*, January 28, 2025, <https://rusi.orghttps://rusi.org>

³⁴ *U.S. Cuts Pakistan Security Assistance over Terror Groups*, January 4, 2018, <https://www.bbc.com/news/world-us-canada-42574139>

actions, which threatened to destabilise South Asia. Instead, Trump offered superficial gestures, such as mediating the Kashmir issue, which lacked substance and failed to deter New Delhi's aggressive policies, including the revocation of Article 370 in Jammu and Kashmir.³⁵ Pakistan's critical role in advancing the Afghan peace process, a significant and commendable effort, showcased its commitment to regional stability.³⁶ However, the US's narrow engagement disregarded Islamabad's legitimate concerns. This approach left Pakistan to navigate a volatile regional environment, marked by growing strategic imbalances and unchecked Indian assertiveness, with limited support or recognition from Washington.

Geopolitical Shifts and the U.S.-Pakistan Bilateral Dynamics in Trump's Second Term

The trajectory of the U.S.-Pakistan relations during Donald Trump's second term reveals a complex and challenging landscape. Strategic alignments, personnel appointments, and ongoing global dynamics will likely significantly shape these relations. Former Pakistani diplomats have expressed concerns that the U.S. policies towards Pakistan will continue to be shaped by its ties with India and China rather than recognising Pakistan's independent strategic significance.³⁷ Madiha Afzal's article titled, *The New and Low Normal in US-Pakistan Relations* contends that the Biden and Trump administrations have increasingly viewed Pakistan as a secondary player, resulting in a shallow and pragmatic relationship.³⁸ Given its strategic location and historical involvement in global affairs, this perspective overlooks Pakistan's critical role in regional geopolitics.

³⁵ Umair Jamal, "Did Trump's Kashmir Gaffe Push India's Article 370 Timeline?," <https://thedi diplomat.com/2019/08/did-trumps-kashmir-gaffe-push-indias-article-370-timeline/>.

³⁶ Khanum Shafique, "The Afghan Peace Process and Pakistan's Crucial Role," *Modern Diplomacy*, March 26, 2024, <https://moderndiplomacy.eu/2024/03/26/the-afghan-peace-process-and-pakistans-crucial-role/>

³⁷ "U.S. Policy towards Pakistan Overly Influenced by China, India Ties, Say Former Diplomats," *Nation*, <https://www.nation.com.pk/23-Jan-2025/us-policy-towards-pakistan-overly-influenced-by-china-india-ties-say-former-diplomats>

³⁸ Madiha Afzal, "The New, and Low, Normal in U.S.-Pakistan Relations," *Lawfare*, accessed January 25, 2025, <https://www.lawfaremedia.org/article/the-new-and-low-normal-in-u.s.-pakistan-relations>.

Trump's cabinet includes members with strong pro-Indian leanings, such as Marco Rubio and Mike Waltz, who have advocated for stronger U.S.-India ties to counter China in the Asia Pacific.³⁹ This alignment could further strain the U.S.-Pakistan relations, as Pakistan often feels overshadowed by the preferential treatment given to India by the U.S. This continued emphasis, coupled with Trump's appointments like Ricky Gill as Senior Director for South and Central Asia at the National Security Council (NSC), suggests that the U.S. will focus on this region, potentially reinforcing its alliance with India.⁴⁰

Meanwhile, Trump's approval of 5th-generation F-35 jets for India under the Indo-Pacific Economic Framework (IPEF) exacerbates the military imbalance with Pakistan.⁴¹ Analysts warn this sale, coupled with joint drone and missile defence projects, could trigger an arms race, pushing Pakistan to deepen reliance on China's J-10C fighters.⁴² The asymmetry is stark: India's defence spending (US\$70 billion in 2024) dwarfs Pakistan's (US\$11 billion).

This assertiveness is reflected in statements by the Indian Defence Minister Rajnath Singh and External Affairs Minister S. Jaishankar, who have emphasised the need for Pakistan to address India's concerns about terrorism.⁴³ Furthermore, India's evolving relations with the Afghan Taliban add another layer of complexity to regional dynamics. India has

³⁹ Kamran Yousaf, "Trump's Cabinet Picks Put Pakistan on Toes," The Express Tribune, November 18, 2024, <https://tribune.com.pk/story/2510289/trumps-cabinet-picks-put-pakistan-on-toes>.

⁴⁰ IANS, "Donald Trump Appoints 2 Indian Americans as Special Assistants," National Herald, January 25, 2025, <https://www.nationalheraldindia.com/international/donald-trump-appoints-2-indian-americans-ricky-gill-and-saurabh-sharma-as-specialassistants>.

⁴¹ "Islamabad Indignant after US Offers F-35 Jets to India," DAWN.COM, February 15, 2025, <https://www.dawn.com/news/1892011>.

⁴² Nandita Bose and Mike Stone, "Trump Says US to Increase Military Sales to India, Eventually Provide F-35 Jets | Reuters," February 14, 2025, <https://www.reuters.com/business/aerospace-defense/markets/commodities/trump-says-india-agreed-purchase-more-us-oil-gas-2025-02-13/>.

⁴³ *Military Hits Back at Indian Army Chief Calling Pakistan 'Epicentre of Terrorism'*, January 16, 2025, <https://www.pakistantoday.com.pk/2025/01/16/military-hits-back-at-indian-army-chief-calling-pakistan-epicentre-of-terrorism/>

been incrementally strengthening its ties with the Taliban, a move seen as a part of its broader strategy to limit Pakistan's influence in Afghanistan.

Recent high-level meetings between Indian officials and the Taliban, including a publicly acknowledged engagement on January 8, 2025, have sparked speculation about India's strategic objectives in the region. By engaging with the Taliban, India appears to be reducing Pakistan's strategic leverage in Afghanistan.⁴⁴ Pakistan views India's engagement with the Taliban as a threat to its national security interests, particularly given the Taliban's historical ties with anti-Pakistan groups like the Tehreek-i-Taliban Pakistan (TTP). The TTP has been accused of receiving support from elements within Afghanistan, which Pakistan sees as a part of a broader strategy by India to destabilise its western border.⁴⁵ In this context, U.S.–Pakistan relations entered a complex phase in early 2025.

The extradition of Tahawwur Rana — a Pakistani-born Canadian-American accused of involvement in the 2008 Mumbai attacks — on April 10, 2025, marked a diplomatic flashpoint.⁴⁶ The U.S. Supreme Court's decision to approve Rana's extradition to India, following intense lobbying from New Delhi, was hailed by Indian officials as a landmark in counterterrorism cooperation. Following the verdict, the U.S. issued strong public statements urging Pakistan to take “credible and verifiable action” against cross-border terrorism, particularly targeting TTP and *Lashkar-e-Taiba*.⁴⁷ These developments signalled a rigid transactional

⁴⁴ Anjana Pasricha, “India Steps up Engagement with Taliban,” *Voice of America*, January 15, 2025, <https://www.voanews.com/a/india-steps-up-engagement-with-the-taliban-/7937468.html>

⁴⁵ Siân Herbert and Iffat Idris, “Effects of Pakistan-Afghanistan Borderlands Instability on Stability and Security in Pakistan,” Rapid Report, Cross-Border Conflict Evidence, Policy and Trends (XCEPT) Research Programme,” July 2024, <chrome-extension://efaidnbmnnnibpcajpcglclefindmkaj/https://www.xcept-research.org/wp-content/uploads/2024/08/20240802-Borderland-Pak-stability-clean-for-typeset-.pdf>

⁴⁶ United States Department of State, “Extradition of Tahawwur Rana to India,” United States Department of State, April 10, 2025, <https://www.state.gov/extradition-of-tahawwur-rana-to-india>.

⁴⁷ Tanika Godbole and Dmytro Hubenko, “U.S.: Tahawwur Rana Can Be Sent to India over Mumbai Attack – DW – 01/25/2025,” *Dw.Com*, <https://www.dw.com/en/us-tahawwur-rana-can-be-sent-to-india-over-mumbai-attack/a-71406218>

U.S. posture where cooperation remained contingent on Pakistan's perceived strategic utility.

However, U.S. tone shifted significantly following the April 22 Pahalgam attack, which escalated into a three-week India-Pakistan crisis marked by aerial skirmishes and cross-border shelling.⁴⁸ Washington, initially silent, moved quickly to mediate. The May 10 ceasefire agreement, brokered through quiet U.S. diplomacy, altered the dynamics.⁴⁹ Pakistan's offer to allow an international investigation into the Pahalgam incident — and India's refusal — earned Islamabad cautious praise in Washington. President Trump, in his Congressional address, explicitly commended Pakistan's counterterrorism efforts against ISKP, calling them "concrete and commendable steps" toward regional security.⁵⁰ This recognition marked a notable contrast from the accusatory tone earlier.

Additionally, Pakistan has strategically leveraged the misuse of abandoned U.S. military equipment now in the hands of TTP and other militants, as evidence of shared threats. By presenting this as a risk to both U.S. interests and Pakistani national security, Pakistan repositioned itself as a necessary partner in stabilizing post-withdrawal Afghanistan.⁵¹ This aligns with Trump's broader emphasis on asset retrieval and targeted, cost-efficient security cooperation, allowing Pakistan a narrow but vital role in U.S. regional planning.

At the same time, Pakistan is courting U.S. interest in critical minerals to rebalance the relationship beyond security. During a meeting on April 7, 2025, Secretary of State Marco Rubio and Finance Minister Ishaq Dar

⁴⁸ Diya Ashtakala, "What Led to the Recent Crisis Between India and Pakistan?," *Center for Strategic and International Studies (CSIS)*, May 20, 2025, <https://www.csis.org/analysis/what-led-recent-crisis-between-india-and-pakistan>.

⁴⁹ Abid Hussain, "What Did India and Pakistan Gain – and Lose – in Their Military Standoff?," *Al Jazeera*, May 14, 2025, <https://www.aljazeera.com/news/2025/5/14/what-did-india-and-pakistan-gain-and-lose-in-their-military-standoff>

⁵⁰ "Trump Criticises India, Praises Pakistan in State of the Union Address, 'I Want to Thank Pakistan For...,'" *Financial Express*, March 5, 2025, <https://www.financialexpress.com/world-news/trump-criticises-india-praises-pakistan-in-state-of-the-union-address-i-want-to-thank-pakistan-for/3767830/>

⁵¹ Muhammad Khan, "Retrieval of U.S. Military Equipment from Afghan Taliban," *Pakistan Observer*, January 26, 2025, <https://pakobserver.net/retrieval-of-us-military-equipment-from-afghan-taliban/>

discussed bilateral trade, where Pakistan offered limited mining rights in regions such as Reko Diq to attract American investment in lithium and rare earths.⁵² Rubio, in public remarks following the meeting, acknowledged “the strategic importance of Pakistan’s mineral reserves in building resilient global supply chains.”⁵³ This economic angle may help Islamabad diversify its diplomatic leverage in a geopolitical environment increasingly defined by technological competition and resource security.

While the U.S.-India strategic partnership continues to deepen, Pakistan has demonstrated that it still holds relevance in Washington’s evolving regional calculus — particularly when it presents solutions that align with U.S. transactional priorities.

Recalibrating the U.S. Policy Toward Afghanistan Under the Trump’s Second Term

Trump’s first presidency marked a decisive shift in U.S. policy toward Afghanistan, culminating in the 2020 Doha Agreement with the Taliban.⁵⁴ The deal set the stage for a phased U.S. withdrawal, which was ultimately executed under President Joe Biden in August 2021. That withdrawal not only triggered a humanitarian crisis but also left advanced U.S. military hardware in Taliban hands, raising concerns about regional destabilisation.⁵⁵ As Trump resumes office, his approach appears shaped by a strong desire to reverse what he describes as a “strategic blunder,” signalling a tougher, security-first recalibration of U.S.-Taliban relations.

In multiple speeches since early 2025, Trump has pledged to retrieve or neutralise U.S. equipment abandoned in Afghanistan, accusing the

⁵² Baqir Sajjad, “Trade Is Foundation of U.S.-Pakistan Future Ties, Says Rubio,” *Dawn*, <https://www.dawn.com/news/1902774>

⁵³ Sajjad, “Trade Is Foundation of U.S.-Pakistan Future Ties, Says Rubio.”

⁵⁴ *Afghan Conflict: U.S. and Taliban Sign Deal to End 18-Year War*, February 29, 2020, <https://www.bbc.com/news/world-asia-51689443>.

⁵⁵ “The U.S. Left Billions Worth of Weapons in Afghanistan,” <https://foreignpolicy.com/2022/04/28/the-u-s-left-billions-worth-of-weapons-in-afghanistan/>.

Biden administration of empowering insurgent groups.⁵⁶ Meanwhile, Secretary of State Marco Rubio, in June 2025, alleged that Taliban factions are detaining American citizens and warned of “very big bounties” being placed on Taliban leaders.⁵⁷ This confrontational tone reflects an emerging doctrine of coercive pressure, relying on economic levers, intelligence operations, and limited military posturing rather than direct intervention. The fragility of the relationship is underscored by the unresolved fate of two U.S. hostages — George Glezzmann and Mahmood Habibi — still believed to be in Taliban custody.⁵⁸

At the same time, Trump’s role in mediating the May 2025 India-Pakistan crisis has opened up new diplomatic avenues. His administration’s successful de-escalation of cross-border hostilities was viewed in Islamabad as a constructive shift, contrasting with earlier periods of U.S. indifference or imbalance. By treating Pakistan as a responsible regional actor capable of restraining escalation, Washington signalled a willingness to engage beyond narrow counterterrorism benchmarks. Pakistan interprets this as a positive reorientation, potentially aligning U.S. crisis-management needs with Islamabad’s long-standing desire for diplomatic relevance in South Asia.

Resource Geopolitics and the U.S.-China Competition

Trump’s proposal to reclaim Bagram Air Base — once the linchpin of U.S. military operations in Afghanistan — underscores the re-emergence of Afghanistan as a contested site in the U.S.–China strategic rivalry.⁵⁹ Since

⁵⁶ Ayaz Gul, “Trump Seeks Return of U.S. Military Equipment from Afghan Taliban,” *Voice of America*, January 20, 2025, <https://www.voanews.com/a/trump-seeks-return-of-us-military-equipment-from-afghan-taliban-/7943249.html>

⁵⁷ “Rubio Warns of ‘Very Big’ Bounties from US for Taliban Leaders,” *South China Morning Post*, January 26, 2025, <https://www.scmp.com/news/us/politics/article/3296319/rubio-warns-very-big-bounties-us-taliban-leaders>.

⁵⁸ Alex Marquardt, “Two Americans Held in Afghanistan Traded for Taliban Prisoner in Final Biden Deal Delayed until Trump Took Office | CNN Politics,” *CNN*, January 21, 2025, <https://www.cnn.com/2025/01/21/politics/us-prisoners-taliban-release/index.html>.

⁵⁹ Shubhangi Palve, “Trump Plans To ‘Reclaim’ Critical South Asian Airbase — A Strategic Outpost Near China’s Nuclear Sites?,” March 20, 2025,

the U.S. withdrawal in 2021, reports suggest that Chinese state-linked firms have assessed Bagram's infrastructure for potential dual-use applications, including logistics hubs and resource extraction corridors. Trump's public rhetoric in April 2025, calling for U.S. re-engagement at Bagram, aligns with a broader push to counter China's Belt and Road Initiative (BRI) footprint in the region. The base's geographic proximity to Afghanistan's estimated US\$1 trillion in untapped mineral reserves — including lithium, copper, and rare earth elements — positions it as both a symbolic and strategic asset in the evolving Indo-Pacific chessboard.⁶⁰

Afghanistan's mineral wealth has become central to Trump's narrative of achieving critical mineral independence from China. The administration has floated proposals for public-private partnerships to extract resources, especially lithium — with Afghan deposits potentially rivalling those of Bolivia.⁶¹ However, such engagement risks legitimising the Taliban regime, complicating Pakistan's strategic calculus. Islamabad is wary of any U.S. moves that might strengthen Indian or Chinese influence in Afghanistan while also navigating its own fraught ties with the Taliban government.

To manage this geopolitical balancing act, Pakistan has proactively inserted itself into the critical minerals equation. In April 2025, during bilateral talks in Washington, Pakistan offered the U.S. limited mining rights in mineral-rich regions such as Reko Diq (Balochistan), Thar coalfields (Sindh), and Chagai and Gilgit-Baltistan, home to substantial deposits of copper, lithium, antimony, and rare earths.⁶² These offers align with Washington's strategy to diversify supply chains away from China, presenting Pakistan as a low-cost, resource-rich alternative with logistical proximity to both Central Asia and the Persian Gulf.

<https://www.eurasiantimes.com/trump-plans-to-reclaim-critical-south-asian-airbase-a-strategic-outpost-near-chinas-nuclear-sites/>.

⁶⁰ Ernest Scheyder and Jarrett Renshaw, "Exclusive: Trump Seeks Minerals Refining on Pentagon Bases to Boost US Output, Sources Say | Reuters," March 11, 2025, <https://www.reuters.com/world/us/trump-seeks-minerals-refining-pentagon-bases-boost-us-output-sources-say-2025-03-10/>.

⁶¹ Hamayun Khan, "Afghanistan's Lithium: Sovereignty vs. Foreign Exploitation," *The Diplomat*, <https://thediplomat.com/2024/08/afghanistans-lithium-sovereignty-vs-foreign-exploitation/>

⁶² Sajjad, "Trade Is Foundation of U.S.-Pakistan Future Ties, Says Rubio."

If implemented, this cooperation could reshape U.S.-Pakistan economic relations, moving them beyond traditional aid-based frameworks toward mutual commercial partnerships. For Pakistan, this mineral diplomacy offers a pathway to ease its balance-of-payments crisis, attract foreign direct investment, and reduce dependence on Chinese debt-linked projects. For the U.S., securing mineral access in both Afghanistan and Pakistan would help build resilient supply chains for its tech and defence industries — a strategic imperative in its broader competition with China.

In essence, mineral geopolitics is emerging as the new axis of U.S. engagement in South and Central Asia. For Pakistan, the challenge lies in leveraging its resources without alienating Beijing or appearing overly transactional to Washington. The opportunity, however, is unprecedented — if handled with strategic foresight.

ISK Threat and Counterterrorism Realities

The growing threat posed by Islamic State Khorasan (ISK) has reshaped the contours of U.S. counterterrorism (CT) engagement in the region. ISK's high-profile attacks in Kabul (January 2025) and Kunduz (March 2025) — including a suicide bombing targeting international diplomatic compounds — have forced Washington to maintain minimal, indirect coordination with the Taliban, despite its official policy of non-recognition.⁶³ These tactical interactions are viewed as a necessary evil to contain a mutual adversary whose reach threatens not only Afghanistan's internal security but also broader regional stability.

For Pakistan, ISK represents a clear and immediate security concern. With its porous 2,600-kilometre border with Afghanistan and a history of cross-border militant infiltration, Islamabad views ISK's resurgence as both a national and regional threat. Pakistani intelligence has reportedly shared actionable intelligence with the U.S. on ISK movements in eastern

⁶³ Tricia Bacon, "The Islamic State in Khorasan Province: Exploiting a Counterterrorism Gap," *Center for Strategic and International Studies*, April 11, 2024, <https://www.csis.org/analysis/islamic-state-khorasan-province-exploiting-counterterrorism-gap>.

Nangarhar and Kunar provinces, areas abutting Pakistan's tribal belt.⁶⁴ This convergence of threat perception creates a window for reviving tactical CT cooperation between the two countries, including joint surveillance, intelligence fusion cells, and potentially limited drone coordination in border zones.

However, the scope of this cooperation is unlikely to extend far beyond the CT domain, at least in the near term. Deep-rooted strategic mistrust — particularly over Pakistan's ties with China and the Taliban — continues to constrain broader alignment. While counterterrorism collaboration offers a functional bridge for engagement, it does not yet signal a return to comprehensive strategic cooperation. The U.S. remains cautious, treating Pakistan as a CT facilitator rather than a strategic partner, and Islamabad appears content to leverage this cooperation for diplomatic credibility and selective concessions, rather than full-spectrum alliance realignment.

Freezing Aid and Demanding Accountability

Since Donald Trump's return to the White House, the U.S. engagements with the Taliban have been minimal, reflecting a hardline stance against the group. Members of Trump's Republican Party have criticised even the limited humanitarian assistance authorised during the Biden administration which had emphasised that such aid was directed toward urgent humanitarian needs and not routed through the Taliban.⁶⁵ Senator Marco Rubio has gone further by advocating for freezing nearly all the U.S. aid globally, underscoring a more rigid approach toward the Taliban, who remain unrecognised internationally due to their harsh governance policies, particularly their severe restrictions on women and girls under an ultra-conservative interpretation of Islam.⁶⁶ On January 21, White House

⁶⁴ Husain Haqqani, "Engaging Pakistan in a New Era of US Foreign Policy," Hudson Institute, June 4, 2025, <https://www.hudson.org/foreign-policy/engaging-pakistan-new-era-us-foreign-policy-husain-haqqani>

⁶⁵ Mustafa Muneer, "2024 U.S. Elections and Afghanistan's Uncertain Future," South Asian Voices, November 4, 2024, <https://southasianvoices.org/geo-m-af-n-us-elections-afghanistan-11-4-2024/>.

⁶⁶ Jennifer Hansler, "U.S. Freezes Almost All Foreign Aid Effective Immediately," CNN, January 24, 2025, <https://www.cnn.com/2025/01/24/politics/us-freezes-foreign-aid/index.html>

National Security Council spokesman Brian Hughes reaffirmed the administration's position, stating that the U.S. "will continue to demand the release of all Americans held by the Taliban, especially in light of the billions of dollars in [the form of the] U.S. aid they have received in recent years."⁶⁷ This stance indicates a shift toward prioritising accountability and pressuring the Taliban while maintaining a firm rejection of their legitimacy.

Future Prospects for South Asia

Donald Trump's re-election has significant implications for regional security in South Asia, particularly concerning India, Pakistan, and Afghanistan. As the geopolitical landscape evolves, Trump's foreign policy is expected to reflect continuity and change from his first term, focusing on countering China's influence while navigating complex relationships with South Asian nations.

Implications for the U.S.-India Relations

The U.S.-India relations are seem to be poised with challenges and opportunities during the second tenure of Trump. The administration has signalled a strong commitment to strengthening bilateral ties, with Secretary of State Marco Rubio prioritising the relationship in his first diplomatic engagements. Key areas of focus include defence cooperation, trade, and immigration. Trump has emphasised the need for "fair trade" and encouraged India to purchase more U.S.-made security equipment, which could enhance defence ties and introduce trade tensions due to potential tariffs. Despite these challenges, both nations share strategic interests in countering Chinese influence in the Asia Pacific, potentially leading to deeper collaboration through frameworks like the Quad. However, India must navigate these opportunities carefully, balancing its economic and security goals with the need to maintain a delicate relationship with China.

⁶⁷ "U.S. May Put Bounty On Taliban Leaders Over Hostages, Rubio Says," News, *Radio Free Europe/Radio Liberty*, 08:18:25Z, <https://www.rferl.org/a/afghanistan-taliban-rubio-hostages-bounty/33289120.html>

A pivotal moment in Trump's second term was the anticipated Trump-Modi meeting in April 2025, where both leaders aimed to finalise a Bilateral Trade Agreement (BTA) and defence deals worth US\$15 billion.⁶⁸ The BTA seeks to address India's US\$30 billion trade surplus with the U.S. by expanding market access for the American energy and agricultural exports.⁶⁹ While beneficial for the U.S. industries, the agreement risks exacerbating India's economic challenges, particularly if tariffs on Indian generics and textiles are imposed — a concern for Pakistan, which competes with India in textile exports.

Implications for the U.S.-Pakistan Relations

Under Donald Trump's renewed presidency, U.S.-Pakistan relations remain tense, largely due to Washington's reaffirmed pro-India orientation. However, the April–May 2025 India–Pakistan crisis created a rare diplomatic opening for Islamabad. Trump's mediation efforts and public appreciation of Pakistan's openness to third-party investigation—contrasted with India's refusal — helped soften Washington's rigid posture and briefly reposition Pakistan as a responsible regional actor. Simultaneously, the misuse of the U.S. military equipment by TTP militants operating from Afghanistan has reinforced shared security concerns. By spotlighting this threat, Pakistan can argue its relevance in Trump's priorities: safeguarding American military assets and confronting transnational terrorism. Joint efforts against ISK and border militancy offer functional space for counterterrorism cooperation, if not full strategic alignment.

Though mistrust lingers, this dual-track engagement — crisis diplomacy and pragmatic trade — offers Pakistan an opportunity to recalibrate ties. To capitalise, Islamabad must project strategic consistency, deepen bipartisan ties in Washington, and position itself as a stabilising force in South Asia's evolving security landscape.

⁶⁸ “India's Modi Says Trump Has ‘clear Roadmap’ in Second Term,” *Reuters*, March 17, 2025, <https://www.reuters.com/world/india/indias-modi-says-trump-has-clear-roadmap-second-term-2025-03-17/>.

⁶⁹ India Briefing, “India Prepares Tariff Cut Plan for U.S. Trade Deal,” *India Briefing News*, March 12, 2025, <https://www.india-briefing.com/news/india-prepares-tariff-cut-plan-for-us-trade-deal-36494.html/>

Afghanistan: A Complex Landscape

Donald Trump's second term as U.S. President has ushered in a more assertive posture toward Afghanistan, marked by calls for the retrieval of abandoned U.S. military equipment and renewed accusations that the Taliban is harboring American hostages. This hardline approach reflects a shift from the cautious engagement under Biden to a rhetoric-driven strategy that emphasises accountability over diplomacy. While it resonates with Trump's broader narrative of reversing perceived national security failures, it risks undermining humanitarian aid mechanisms and exacerbating Afghanistan's isolation.

Despite the absence of formal diplomatic ties, indirect engagement persists, primarily around counterterrorism objectives — particularly the containment of Islamic State Khorasan (ISK). For regional actors like Pakistan, this evolving U.S. posture presents both risks and opportunities. By positioning itself as a buffer against ISK's transnational spread and offering intelligence on Taliban-linked instability, Pakistan can carve out a limited but functional CT role within Trump's Afghanistan calculus. However, long-term cooperation will remain transactional unless broader regional strategies evolve beyond short-term security imperatives.

Conclusion

Donald Trump's second presidency is reshaping South Asia's strategic landscape through a transactional, interest-centric foreign policy that prioritises short-term U.S. gains. Central to this shift is the deepening U.S.–India partnership, exemplified by high-profile defence deals — including the proposed sale of F-35 fighter jets — and growing strategic convergence under the Indo-Pacific strategy. These developments have emboldened India's regional posture, particularly vis-à-vis Pakistan, intensifying the asymmetry in military capabilities and weakening incentives for diplomatic engagement. For Islamabad, the implications are stark: strategic isolation, heightened security pressures, and a reinforced reliance on China, particularly through initiatives like CPEC.

The April-May 2025 India-Pakistan crisis highlighted the fragility of regional stability and offered a rare window for Pakistan to reassert

diplomatic agency. Trump's decision to mediate, and his public praise for Pakistan's openness to investigation, stood in contrast to India's rejection of third-party scrutiny. This episode momentarily recalibrated Washington's tone, enabling Islamabad to frame itself as a responsible actor. Simultaneously, Pakistan has sought to capitalise on shared counterterrorism concerns — particularly regarding the TTP's access to the U.S. equipment from Afghanistan — to restore limited security cooperation. The June 2025 U.S.-Pakistan trade agreement further suggests potential for economic engagement beyond strategic posturing.

However, Pakistan's strategic balancing act is becoming increasingly difficult. India's discreet engagement with the Taliban, aimed at undermining Pakistan's influence in Afghanistan, poses a growing challenge. Meanwhile, Trump's focus on reclaiming Bagram Air Base and exploiting Afghanistan's mineral wealth reflects a wider U.S.-China rivalry, where both Afghanistan and Pakistan are arenas of competition. Without a recalibrated and inclusive U.S. policy that recognises Pakistan's intrinsic strategic value — beyond the India-China binary — the region risks deepening polarisation, arms races, and diplomatic paralysis. In this volatile setting, Islamabad must amplify its role as a stabiliser, pursuing proactive engagement with both Washington and Beijing, while leveraging its geographic and diplomatic capital to prevent South Asia from sliding into zero-sum confrontation.