

The Modi Doctrine and India's Strategic Transformation: Analysing the Shift From Non-Alignment to Assertive Multilateralism (2014 Present).

Ashutosh Devendra Kumar

Abstract

When India continued buying Russian crude oil in the months after the February 2022 invasion of Ukraine deepening purchases even as G7 governments-imposed sanctions and demanded alignment Western commentators reached for the usual explanations: historical ties, strategic autonomy doctrine, the non-alignment reflex. These explanations were not wrong, but they were insufficient. India's behaviour was neither sentimental nor passive. It was a calculation, and a profitable one. This paper argues that the Modi government has reconstituted India's foreign policy around a logic of geo-economic extraction the deliberate use of diplomatic positioning, multilateral membership, and geopolitical leverage to acquire the material inputs that domestic industrial transformation requires. The Russian oil procurement is one expression of this. The simultaneous extraction of semiconductor technology through the QUAD-iCET framework, Gulf sovereign wealth through issue-specific minilateralism, and manufacturing FDI through the China-plus-one repositioning are others. The result has been real and substantial gains. The costs institutional shallowness, credibility deficits in alliance contexts, growing Eurasian dependency are real too, and the paper addresses them without the usual hedging.

Keywords: India, Modi Doctrine, geo-economic extraction, multi-alignment, Atmanirbhar Bharat, Transactional Realism

1. INTRODUCTION

There is a before and after in Indian foreign policy, and 2014 is the dividing line. This is not a claim about style Modi's personal diplomacy, the diaspora rallies, the summit theatrics but about the underlying logic of how India approaches international relationships and what it expects from them. For roughly seven decades after independence, Indian foreign policy operated within a framework that Nehruvian scholarship built and that successive governments, even when they quietly departed from it, felt compelled to invoke. That framework had genuine coherence: non-alignment as the refusal of Cold War binaries, Third World solidarity as the ethical basis for a leadership claim among newly decolonised states, and moral authority as a form of diplomatic capital distinct from and in Nehru's view superior to the crude accumulation of material power. What it produced, eventually, was a foreign policy that had elevated self-image above interest and found, by the 1990s, that the self-image was no longer generating returns.

The BJP's 2014 majority the first single-party parliamentary majority since Rajiv Gandhi's in 1984 eliminated the coalition arithmetic that had embedded ideological vetoes throughout foreign policy for two preceding decades. This structural fact matters more than it is usually credited. When the United

Progressive Alliance negotiated sensitive bilateral arrangements, it operated within constraints set by coalition partners with genuine foreign policy positions: suspicion of Washington, solidarity with Palestine, reluctance on any arrangement that looked like it subordinated Indian sovereignty to Western frameworks. Removing those constraints freed the executive to conduct foreign policy as strategy rather than as managed coalition maintenance.

What the Modi government chose to do with that freedom is the subject of this paper. The central argument is that Indian foreign policy has been reconstituted around what this paper calls geo-economic extraction: the systematic deployment of diplomatic relationships, multilateral participation, and geopolitical positioning to acquire tangible material resources energy, capital, technology, critical minerals, logistics infrastructure that directly underwrite domestic developmental objectives. This is distinct from classical economic diplomacy, which treats commercial outcomes as a by-product of foreign policy engagement. Under the Modi Doctrine, as S. Jaishankar (2020) has been candid enough to state, the Ministry of External Affairs functions as an instrument for advancing India's national transformation. The extraction is the purpose, not a side effect.

India's procurement of discounted Russian crude oil is the clearest case. Facing considerable Western pressure to join a sanctions regime after February 2022, India expanded its Russian purchases, securing discounts that at their peak ran to USD 30–40 per barrel below Brent, generating aggregate fiscal savings estimated at USD 40–50 billion between 2022 and 2024. Those savings did not disappear into consolidated revenue. They entered the petroleum pricing architecture that keeps domestic fuel costs politically manageable, and they freed fiscal room for the Production-Linked Incentive (PLI) scheme outlays that are the core of Atmanirbhar Bharat industrial policy. Diplomatic positioning converted into budgetary resources, which converted into electoral sustainability for an ambitious manufacturing programme. The mechanism is direct and traceable.

The same logic, operating through different instruments and different relationships, shapes India's semiconductor strategy with the United States, its unilateral engagement with Gulf sovereign wealth funds, and its post-Galwan economic repositioning against China. Three questions give the analysis its structure: how has India managed the tension between QUAD security commitments and its Russia-BRICS economic relationships? To what extent has the MEA been operationally reconfigured as a developmental instrument? And what institutional constraints limit how far this strategy can be pushed? The existing literature on Modi-era foreign policy C. Raja Mohan's strategic cartography, Harsh Pant's multi-alignment analyses, Jaishankar's own writing is strong on geopolitical architecture and weak on the domestic developmental interface. The mechanisms through which foreign policy outputs feed industrial policy, subsidy architecture, and the fiscal foundations of Atmanirbhar Bharat receive little sustained attention. This paper focuses there.

2. The Theoretical Stakes: Autonomy Reconceived

2.1 What Changed in 2014

The standard account of Modi's foreign policy innovation stresses multi-alignment the replacement of Nehruvian equidistance with a more active management of relationships across competing great powers. This is accurate but underspecifies what is actually new. Nehru also sought to maintain India's room for manoeuvre across Cold War blocs. The difference is not the goal but the theory of how to achieve it. Nehru understood strategic autonomy as insulation: the refusal of formal commitments that would constrain India's freedom of action. This produced a foreign policy fundamentally reactive to great-power

competition, deriving its leverage from the ability to withhold alignment. Modi's India has inverted the logic. Strategic autonomy is now understood as maximal engagement on India's terms the simultaneous cultivation of relationships with competing powers that generates leverage not from withholding alignment but from being indispensable to multiple actors at once. The distinction matters enormously in practice. A state pursuing Nehruvian autonomy says no to both sides and derives leverage from that refusal. A state pursuing Modi's version says yes to both sides, on selectively favourable terms, and derives leverage from each partner's fear that India might say yes to the other more fully.

Jaishankar's articulation in *The India Way* is the clearest authoritative statement of this shift. Indian diplomacy, he argues, pursues "reciprocal partnerships" whose value is measured by what they yield: energy security, technology transfers, market access, investment. C. Raja Mohan has identified the structural precondition: the BJP majority eliminated the coalition-era vetoes that had made foreign policy a game of lowest-common-denominator management. Harsh Pant's characterisation of the result as "deal-based realism" captures the operational texture not Waltzian structural realism with its long time horizons and systemic balancing, but a targeted exploitation of bilateral asymmetries in resource endowment, technological capacity, and time preference that generate favourable exchange terms.

2.2 Hedging versus Multi-Alignment

The literature has generally conflated strategic hedging with multi-alignment, treating them as equivalent or continuous. They are not. Rajesh Rajagopalan's hedging concept is essentially defensive: maintain relationships across rival powers, avoid hard commitments, preserve fallback options. India's procurement of the Russian S-400 missile system despite CAATSA sanction threats from Washington illustrates this. The S-400 was a hedge against Chinese airpower for which US alternatives were then unavailable; India extracted from Washington a tacit sanctions waiver recognition that India's QUAD participation mattered enough to the United States that enforcing CAATSA would cost more than it gained. That is hedging: risk diversification with a defensive orientation.

Multi-alignment goes further. The deliberate construction of overlapping memberships BRICS and I2U2 simultaneously, QUAD and SCO, ISA and the G20 global south framing is not primarily about risk management. It is about accumulating leverage across multiple parties who value India's participation and worry about its defection. India's fourteen UN abstentions on Ukraine resolutions between 2022 and 2024 were not the behaviour of a state hedging between Washington and Moscow; they were the behaviour of a state that had calculated it could extract from both simultaneously and did not need to choose. The abstentions were the price of the oil discount. The QUAD deepening was the price of the semiconductor transfers. Neither relationship required India to close off the other. Multi-alignment is proactive, where hedging is reactive; it is an offensive posture, where hedging is defensive.

2.3 From Rule-Taker to Rule-Shaper

The transition from passive participation in international institutions to active construction of them is perhaps the most visible manifestation of the broader shift. India's establishment of the International Solar Alliance in 2015 creating a new multilateral framework rather than joining existing climate governance on terms set by others is the clearest structural proof. The Coalition for Disaster Resilient Infrastructure followed the same logic. The 2023 G20 Presidency, during which India secured the African Union's admission as a permanent member and pushed through a New Delhi Declaration on debt restructuring that constrained creditors' options, demonstrated the capacity to use multilateral convening power for agenda-setting rather than merely agenda-compliance.

A rule-taker occupies institutions others built and derives legitimacy from compliance with their norms.

A rule-shaper founds institutions, recruits members, writes operational frameworks, and uses multilateral legitimacy as a resource for advancing national interests. The ISA and the CDRI are India's most concrete evidence of the latter capacity. The G20 Presidency showed it could be exercised within existing institutions too, not just through new ones.

3. Security Architecture Across Three Theatres

India's security posture breaks, analytically, into three distinct theatres each with its own logic and extractive objective.

The Indo-Pacific is governed by what T.V. Paul has called Limited Hard Balancing: capacity-building engagement with the QUAD designed to constrain Chinese maritime assertiveness without the mutual-defence obligations that would formally close off the Russia relationship or provoke Beijing into treating India as a declared adversary. Between 2022 and 2025 the QUAD hardened considerably the Indo-Pacific Maritime Domain Awareness framework, based now at an Indian data fusion centre in Gurugram, integrates satellite surveillance and real-time maritime data-sharing across all four members. Malabar exercises expanded to include Australia and, from 2024, the Philippines, and shifted toward anti-submarine warfare and integrated missile defence. Arzan Tarapore's description of India as an evolving "net security provider" reflects a qualitative change in India's QUAD posture from 2017, when the grouping was essentially symbolic.

What the security architecture makes possible economically is the more important story. The Initiative on Critical and Emerging Technologies (iCET), launched at the June 2023 Modi-Biden summit, is a co-development and co-production framework for semiconductors, artificial intelligence, quantum computing, and advanced defence systems. American willingness to offer technology partnerships of this sensitivity going considerably beyond previous bilateral arrangements is contingent on India's QUAD participation. The security relationship is the precondition for the technology extraction; the technology extraction is what justifies the security investment from India's perspective. They are not separable.

Eurasia is governed by Strategic Hedging for resource extraction. India's crude oil imports from Russia went from roughly two percent of total imports in January 2022 to over forty percent by late 2023. The commercial logic was straightforward: discounts running to USD 30–40 per barrel at peak generated savings that at current import volumes India could not afford to refuse. But the relationship's strategic function went beyond cheap oil. By representing a significant bilateral economic partner for Moscow at a moment when Western sanctions were attempting Russia's financial isolation, India preserved Russian strategic independence from the comprehensive absorption into China's economic orbit that the "no limits" partnership of February 2022 had suggested was coming. Rudra Chaudhuri has identified this function clearly: the INSTC with the critical Rasht-Astara railway link finally contracted in 2024 for USD 1.6 billion provides Russia with an Indian-controlled logistics corridor that is not the Belt and Road. India thus positions itself as indispensable to Moscow's interest in not becoming a Chinese tributary state.

The Middle East is governed by Issue-based Minilateralism and what C. Raja Mohan has called principled equidistance, now operationalised as de-hyphenation. India maintains a defence partnership with Israel (bilateral defence trade exceeded USD 10 billion after October 2023), a port access and connectivity relationship with Iran through Chabahar (the ten-year agreement of 2024 committed USD 120 million in port infrastructure), and a comprehensive economic partnership with Saudi Arabia within Vision 2030. That India has sustained all three simultaneously, through a period of intense regional conflict, reflects the operational discipline of issue-disaggregation: each relationship is treated as a functionally discrete matter,

and progress in none is made conditional on the others. P.R. Kumaraswamy is right that this “three-sixty-degree pragmatism” would have been inconceivable under the Nehruvian framework, which required Palestinian solidarity as a prerequisite for Arab credibility and calibrated the Israel relationship against domestic Muslim-majority politics.

The I2U2 grouping India, Israel, UAE, United States, assembled in July 2021 exemplifies the minilateral logic. Its outputs have been concrete: the USD 2 billion UAE-funded food park at Jamnagar, operationalised in 2023, converts Gulf sovereign wealth into Indian industrial infrastructure without requiring India to formally align with any of the broader US-UAE-Israel strategic architecture. India accesses the capital without the political cost of the alliance. Approximately nine million Indian workers in Gulf states generate remittance flows that will, by NITI Aayog projections, approach USD 125 billion in 2025 more than forty percent of India’s total remittance income and a structural component of both the current account and the household savings that underpin domestic consumption.

4. The Extractive Dividends: Atmanirbhar Bharat’s Foreign Policy Foundations

4.1 Double Extraction

The most analytically original feature of India’s approach is what this paper terms the Double Extraction architecture. From Russia, India extracts energy: discounted crude that generates fiscal savings recycled into PLI scheme industrial incentives. Call this substitutive extraction the discount is, effectively, a transfer of fiscal resources from the Russian state to India’s developmental programme. From the United States and its QUAD partners, India extracts technology: semiconductor manufacturing knowledge, quantum computing infrastructure, aerospace co-production capacity. This is generative extraction the technology creates productive capabilities that did not previously exist in the Indian economy.

The significance of running both simultaneously goes beyond the obvious point that it is convenient to have cheap oil and cutting-edge technology at the same time. Developing-country foreign policy has historically been structured around a forced choice: Western alignment provides technology access but demands normative conformity and constrains relationships with alternative powers; engagement with alternative powers preserves autonomy but forecloses technology access. India has broken this constraint by making itself valuable enough to both sides that neither can enforce it. This is the real meaning of multi-alignment in practice: not the juggling of relationships but the exploitation of structural position.

4.2 Semiconductors as the Hero Case

Before 2020, India had no domestic semiconductor fabrication, was entirely import-dependent for a rapidly growing electronics sector, and had just demonstrated through the pandemic supply chain crisis exactly how exposed that made it. The post-Galwan imperative to reduce economic dependence on China arrived simultaneously with the strategic opportunity created by the US-China technology decoupling. The PLI scheme for semiconductors and display fabrication, notified in December 2021, committed approximately USD 10 billion in government incentives fifty percent co-investment in greenfield fabrication projects over six years. This is not a passive FDI attraction instrument. It is a procurement framework using state resources to extract from the global semiconductor ecosystem the productive capacities that Atmanirbhar Bharat requires.

Micron Technology’s USD 2.75 billion investment in an OSAT facility at Sanand, announced at the Modi-Biden summit of June 2023, is the iCET framework’s most concrete expression. Micron’s investment calculus was not commercially driven in any straightforward sense the cost economics of an Indian OSAT relative to established facilities in Malaysia and Thailand do not, in isolation, justify the decision. The

decision was made within a strategic framework in which American government encouragement of supply-chain diversification away from China provided the political rationale. Without the QUAD relationship, the technology extraction does not happen; without the technology extraction, there is no domestic semiconductor capacity; without domestic capacity, the Atmanirbhar Bharat targets for electronics manufacturing are unachievable. The GE-HAL F-414 jet engine co-production arrangement operates through the same logic, reducing import dependence in a militarily critical system while building domestic aerospace manufacturing capability. Electronics FDI rose from USD 0.34 billion in 2014 to USD 15.5 billion in FY2024, a forty-five-fold increase that measures India's movement from rule-taker to rule-shaper in the most consequential supply chain of this decade.

4.3 The Inflation Asymmetry and the Apple Moment

A connection that has received less analytical attention than it deserves is the relationship between India's Russian energy discount and its China-plus-one manufacturing positioning. When European economies lost Russian energy access after February 2022, they experienced consumer price inflation of nine to eleven percent through 2022–2023. India's CPI peaked at 7.2 percent in 2024, driven primarily by domestic food prices rather than energy costs. This divergence was not incidental. The energy discount insulated India's manufacturing cost base from the global price shock at precisely the moment when multinational corporations were conducting the most consequential supply-chain diversification away from China since the first iPhone was assembled in Shenzhen. Lower-cost manufacturing environment, improving logistics infrastructure, and a government actively structuring fiscal incentives for electronics production: the Apple production shift roughly USD 14 billion in production value relocated from China through Foxconn and Tata Electronics represents the convergence of all three. The World Bank's upgrade of India's logistics performance ranking from 38th to 25th between 2018 and 2023 quantifies the infrastructure investment that made this possible.

Post-Galwan trade statecraft reinforced the extraction strategy from the supply side. The banning of over six hundred Chinese applications in June 2020, tariff increases of twenty to one hundred percent on Chinese goods including toys, steel, and consumer electronics (reducing Chinese import penetration by roughly USD 20 billion between 2021 and 2023), and FDI screening through Press Note 3 which blocked over USD 1 billion in Chinese investment proposals created the domestic market space that PLI beneficiaries, Apple's supplier base, and QUAD-aligned technology investors are positioned to fill. The protection and the attraction are two sides of the same industrial policy.

5. The Costs: What Can Go Wrong

The gains are real. So are the structural vulnerabilities, and this section does not minimise them. Personalised diplomacy and its fragility. The Russia oil discount, the iCET framework, the UAE CEPA, and Gulf sovereign wealth commitments were all substantially enabled by direct Modi-to-counterpart engagement. Ian Hall's "charismatic diplomacy" concept captures the mechanism accurately. The problem is that leader-to-leader relationships are non-transferable. They do not generate the institutional infrastructure treaties, standing bureaucratic relationships, binding frameworks that survives leadership transitions. A change of government in Washington, or in New Delhi, would require rebuilding personal rapport that the current architecture treats as a given. Ashley Tellis has noted the asymmetry this creates in the QUAD context: Washington is committed to a Taiwan contingency response that India's non-treaty status does not obligate it to support. Darshana Baruah's characterisation of India as reliable for "coalitions of convenience" but structurally unreliable for Article 5-equivalent crisis response is harsh but not

unfounded. Michael Kugelman's concern that strategic ambiguity on Taiwan may erode deterrence credibility if Beijing calculates India will not support US military operations in a Taiwan scenario describes a potential vicious cycle: less deterrence credibility reduces the strategic value of the US-India relationship, which reduces American willingness to extend sensitive technology cooperation, which constrains the industrial programme that depends on that cooperation.

Russia's structural drift toward China. China now accounts for over thirty percent of Russia's total foreign trade, against roughly fifteen percent pre-invasion. It has also secured crude oil discounts of approximately USD 8 per barrel against Brent compared to India's USD 12 progressively eroding the commercial uniqueness of India's Russian relationship. US Treasury's secondary sanctions architecture has generated real friction for the rupee-ruble payment mechanism that handles approximately sixty percent of India-Russia trade; full secondary sanctions enforcement, per ORF modelling, would raise India's crude import costs by around twenty percent. The deeper risk is strategic: if Russia's progressive subordination to Chinese economic priorities redirects Russian trade flows through Chinese-controlled logistics rather than the INSTC, India's geopolitical wedge dissolves into a logistics subsidy for its primary strategic competitor.

The infrastructure execution gap. India announces connectivity infrastructure with genuine strategic ambition and delivers it at a pace that consistently undermines the strategic function. The Kaladan Multi-Modal Corridor is sixty-five percent complete after more than fifteen years. Against this, China's CMEC reached ninety-two percent completion with the Kyaukphyu deep-sea port now operational. The World Bank (2024) traces India's sixty to seventy percent average project completion rate to structural causes FDI vetting delays, security clearances, inter-ministerial fragmentation rather than resource constraints. An INSTC operating below capacity cannot displace BRI for Russian exporters, regardless of the geopolitical logic that motivated its construction.

Defence import concentration. Despite headline growth in domestic defence production (Rs 1.27 lakh crore in 2024, a sixteen percent year-on-year rise), India imports approximately ninety percent of its aero-engine requirements, and GE F-414 technology transfer negotiations under iCET remained unresolved as of 2025. SIPRI (2025) found sixty-five percent of India's defence imports concentrated among five suppliers, creating a supply-chain concentration risk that adversarial pressure could exploit in exactly the crisis scenarios where deterrence is most needed.

Diplomatic bandwidth. Nine hundred MEA professional diplomats managing substantive engagement across the G20, BRICS+, QUAD, SCO, I2U2, ISA, CDRI, and IMEC against China's seven thousand foreign ministry staff. Ian Hall's "forum-shopping fatigue" is not a rhetorical warning; it is a measurable constraint. The Lowy Institute's (2025) composite influence score shows a ten percent decline for India relative to middle powers that concentrate diplomatic resources more selectively. Presence everywhere risks decisiveness nowhere.

6. The Verdict

India's transition from rule-taker to rule-shaper is real. This is not a claim about aspiration or trajectory; it is a description of accomplished fact in several specific domains. The PLI-iCET semiconductor architecture has made India a participant in the global chip supply chain rather than a passive consumer of it. The International Solar Alliance has given India institutional authority over a multilateral framework it designed and runs. The 2023 G20 Presidency produced the African Union's permanent membership and a debt restructuring declaration both outcomes that constrained more powerful states' options, which is

what rule-shaping means.

The transition is also visible in what India has refused. It has not accepted the Western framing of Ukraine as a test of liberal international order commitment. It has not accepted the American framing of the Indo-Pacific as an anti-China coalition requiring formal security guarantees. It has not accepted the Chinese framing of BRICS as an anti-Western architecture. In each case India has imposed its own framing transactional, selective, non-binding and has done so consistently enough that the framing has stuck. The capacity to refuse others' interpretive frames and substitute your own is a meaningful form of structural power.

The sustainability question is genuine, not rhetorical. The vulnerabilities documented above are not the teething problems of a new strategy; several of them the credibility gap in alliance contexts, the Eurasian dependency, the infrastructure delivery failures are structural. Reaching the Viksit Bharat 2047 targets requires not the abandonment of Transactional Realism but its institutional maturation: converting leader-dependent arrangements into treaty frameworks, staffing up the MEA to match India's forum commitments, accelerating infrastructure delivery to the point where India's connectivity initiatives are operationally competitive with Chinese alternatives, and accelerating domestic defence production to reduce the import concentration that makes deterrence structurally fragile.

None of this invalidates the basic achievement. Nehruvian Moralpolitik asked how India could preserve its moral standing in a world organised around competing great powers. The answer non-alignment, Third World solidarity, principled equidistance made sense for a post-colonial state with moral capital but limited material capacity, operating in a Cold War that rewarded neutrality. The Modi Doctrine asks a different question: what does a state with 1.4 billion citizens, a developmental transformation to finance, and a fracturing international order to navigate need from foreign policy? The answer is less philosophically elegant. It is energy from Russia, semiconductors from the United States, sovereign wealth from the Gulf, and manufacturing relocation from China. Getting all four simultaneously, without formally committing to anyone, is the strategy. It has worked better than its critics predicted and is more fragile than its architects acknowledge. Whether the decade to 2035 brings the institutional deepening that converts tactical gains into structural power is the question Indian foreign policy now faces.

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