

China-India Brief

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Guest Column

India's Critical Minerals Strategy: Deciphering Between Two Dependencies on China

By Nishant Rajeev and Hu Xinyue

After three decades of continuous development and investment, China today **occupies** a central position in global supply chains of critical minerals. Beijing leverages this dominance, through economic statecraft, to punish or retaliate against states during times of geopolitical tension. Such moves have raised concerns in several capitals around the world, including in New Delhi.


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CENTRE ON ASIA
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The *China-India Brief* is a monthly digest focusing on the relationship between Asia's two biggest powers. The Brief provides readers with a key summary of current news articles, reports, analyses, commentaries, and journal articles published in English on the China-India relationship. It features a Guest Column weighing in on key current issues in China-India relations.

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India has pursued both international and domestic measures to address this concern. During Secretary of State Marco Rubio's visit to India in May 2026, India and the US **signed** a bilateral Critical Minerals Framework. On the same day, the Quad also **launched** the Critical Minerals Initiative Framework. Domestically, the Indian government has embarked on an ambitious plan to address its critical minerals supply chain vulnerability to China, through the National Critical Minerals Mission (NCMM) launched in 2025.

China's dominance in critical minerals rests on both access to the resources and control over processing, creating two types of dependencies in critical minerals supply chains. Although India is proceeding coherently on the first dependency, it faces several challenges on addressing the second.

India's Critical Minerals Supply and the Challenge of Overdependence on China

Leveraging its dominance, China is increasingly imposing export controls on critical minerals and related products to obtain favourable geostrategic outcomes. For instance, in **April 2025**, China imposed export restrictions on rare earth magnets and related materials, in response to the US tariffs on Chinese goods. Although these measures may not have been aimed directly at India, they significantly disrupted Indian **electric vehicle manufacturing capacity**. One major Indian automaker was forced to **halve production** due to a shortage of rare earth magnets. Beijing may later **ease** or

suspend such export restrictions, as seen previously. Even so, they have heightened concerns in **India** over the risks associated with overdependence on China-dominated critical mineral supply chains.

India possesses notable critical mineral reserves, but the extent to which these deposits can reduce India's dependence on China remains uncertain. For instance, it holds substantial rare earth reserves of around **6.9** million tonnes, ranking **3rd** globally. However, most of these are **light rare earths**, rather than heavy rare earths, where Chinese supplies remain dominant. India is also the world's **7th** largest lithium resource-rich country. The Geological Survey of India has estimated **5.9** million tonnes of inferred Lithium resources in Jammu and Kashmir's Reasi district. Nevertheless, exploration has been **repeatedly** hindered by insufficient information on grade and by the technical challenges associated with extraction.

India's vulnerability is particularly severe in midstream processing. India currently imports **80–90 percent** of its rare earth magnets and related materials from China, while China accounts for **around 90 percent** of the global rare earth processing and refining capacity. Additionally, India's **limited** domestic lithium refining capacity leaves it heavily dependent on China, which controls **more than two-thirds** of the global total. Such overdependence on China could give Beijing leverage over the pace of India's energy transition and potentially constrain the development of technologies such as semiconductors.

India's Approach to Addressing Overdependence on China

India's vulnerability to China has two distinct dimensions, often collapsed into the broader category of supply chain vulnerability. The first concerns access to critical minerals; the second concerns the capacity to process them into finished products. In 2025, the Indian government **launched** the NCMM to address both vulnerabilities and strengthen its critical mineral supply chains. Implementation, however, has been uneven, alleviating some vulnerabilities while leaving others largely unaddressed.

The two main **goals** of India's NCMM are to secure access to critical mineral resources and strengthen domestic value addition. The latter includes enhancing recycling capabilities as well as domestic processing capabilities. New Delhi has set ambitious **benchmarks** under the NCMM. By 2030, India aims to operationalise 1200 exploration projects domestically and acquire fifty foreign mines. On the processing front, the goal is to implement 400 recycling projects and hold 1000 patents "across the critical minerals lifecycle."

The Indian government has pursued both fronts through domestic policy and international collaboration. It has **earmarked** nearly 2 billion USD for mineral extraction for domestic mining projects and the acquisition of foreign mining blocks. At home, it has begun auctioning several critical mineral mining blocks, although bringing these projects into

operationalisation remains a **challenge**. KABIL (Khanij Bidesh India Ltd), a public sector enterprise established in 2019, is spearheading efforts to secure overseas assets. Its focus has been on Lithium and Cobalt, both essential to battery production, with acquisitions pursued in Argentina, Chile and Australia, among other countries.

Recognising the potential of mineral recycling, the Indian government has pledged 170 million USD to support the sector. This is to be matched by another 500 million USD commitment from the private sector. In the scheme's initial phase, fifty-eight private sector companies have been **selected** for the Incentive Scheme for Promotion of Critical Mineral Recycling.

Finally, India is also leveraging international partnerships to boost critical minerals supply chain security. Critical minerals collaboration forms an important pillar of India's bilateral partnerships with the US, Japan, Australia, and Indonesia, among others. Multilaterally, India is **part** of the Biden-era Minerals Security Partnership (MSP), the **Quad's Critical Minerals Initiative** and more **recently**, the Trump administration's Pax Silica Initiative.

Challenges for India's Critical Mineral Strategy

Despite these positive developments, India's key challenges remain on the processing front, where its strategy appears increasingly hollow.

For now, India is relying on foreign collaboration to bridge the processing gap.

Apart from **copper**, India has few companies **engaged** in processing critical minerals or converting them into finished products. It therefore remains heavily reliant on imports for most other minerals and finished products. This limited domestic industrial base also constrains India's ability to fully participate in and benefit from multilateral initiatives such as Pax Silica, which are largely industry-led and designed to facilitate B2B collaboration. India can use these platforms to bring in foreign investment, but the gains are likely to remain limited without stronger domestic capabilities. Japanese investments in India illustrate this constraint. Major investments such as **Toyota's** 2012 investment and potential **investment** by Proterial involve establishing local manufacturing facilities in India. These measures can strengthen domestic economy and create jobs, but they may do little to build indigenous technological and technical know-how.

Moreover, the Indian government has set a target of producing 1000 patents as part of its effort to develop domestic processing capabilities. But financial support for this objective remains limited. It has earmarked just 60 million USD, compared with nearly 4 billion USD allocated cumulatively to mining and extraction.

More broadly, India's key challenge lies in fostering a strong R&D ecosystem to build industrial capacity at scale to reduce processing dependencies. India **spends** only 0.6 percent of GDP on R&D, compared to 3.5 percent for the US and 2.4 percent for

China. Furthermore, while in the United States and China, the private sector contributes 75 percent and 77 percent respectively for R&D expenditure, in India the **figure** is at 41 percent.

R&D expenditure in critical minerals processing also remains low. In 2023–2024, mineral processing industrial sector in India did not feature among the **top ten** domestic industrial sectors by R&D Expenditure. The picture was similar in 2020–2021, when metallurgical industries in India **spent** approximately 50 million USD on R&D, while mineral processing industries were again absent from the leading industrial groups by R&D expenditure. Such limited investments in R&D, both in the sector and more broadly, highlight the scale of the capability gap India must overcome to reduce its dependencies on China.

Developing a domestic knowledge base will be central to any meaningful reduction of India's dependence on China. This requires a substantially more coherent approach, one that addresses the structural issues in India's scientific capacity, including in mineral processing.

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Myanmar's Rare Earths: The Next Sino-Indian Contest

By Kyi Sin

Sino-Indian relations appeared to enter a phase of managed co-existence after Prime Minister Modi's **high-profile visit** to Beijing for the Shanghai Cooperation Organisation (SCO) meeting in September 2025. Both powers sought to **manage** their strategic rivalry by reducing the risk of direct confrontation, most recently through efforts to de-escalate border tensions. Yet a far less visible and less rule-bound competition has emerged in neighbouring Myanmar. Rapidly rising **global demand** for critical minerals has heightened incentives for China and India to tap into Myanmar's loosely regulated rare earth mining industry, even as the **ongoing civil war** has intensified since 2021.

Myanmar holds neither the world's largest proven rare earth reserves nor its greatest processing capacity. Yet it ranked as the world's **third-largest producer** of rare earth elements in 2024, at 31,000 metric tons. Both of these leads belong to China, whose vast rare earth reserves and near-monopoly over global refining capacity have cemented its dominance of supply chains. However, decades of intensive rare earth extraction have imposed severe environmental and public health **costs**, prompting Beijing to **tighten**



environmental regulations. The resulting compliance costs have, in turn, raised domestic production costs despite rising global demand.

Chinese mining companies have consequently shifted part of their production to countries with weaker regulatory frameworks, including Myanmar. Lower compliance costs and the weak environmental oversight reduce production costs while shifting much of the environmental burden outside China. The 2021 military coup and the civil war that followed have further weakened state oversight. It accelerated the expansion of Myanmar's rare earth industry, which now accounts for **57 percent** of China's rare earth imports. This reflects a broader global pattern in which the polluting industries **relocate** to countries with weaker environmental regulations.

China's dominance of Myanmar's rare earth sector is reinforced by the geography of the industry. Many mines are **located** in

conflict-affected areas along the Sino-Myanmar border or territories controlled by ethnic armed organisations (EAOs) with **close ties** to Beijing, most notably the United Wa State Army (UWSA). Even in areas controlled by the Kachin Independence Organisation (KIO), where relations with Beijing are more strained, China **remains** the principal destination for rare earth exports. Its geographic proximity, established cross-border logistics networks, and easier access to finance give Chinese firms a significant advantage. These factors allow them to sustain investment despite the conflict. For many EAOs, rare earth mining has become an important source of **revenue, reducing incentives** to regulate the industry despite mounting environmental concerns.

However, China's dominant position is no longer uncontested. Some local actors have sought to diversify their rare earth export partners to include China's geopolitical rivals. Myanmar opposition-linked lobbyists reportedly **pitched** to President Trump a redirection of critical rare earth supplies away from China. Despite some interest in Washington, the United States lacks the infrastructure, geographic proximity, and established relationships with key actors in Myanmar needed to compete effectively with China.

India, by contrast, has shown greater interest in Myanmar's rare earth potential. It also appears better positioned than the US to engage the relevant stakeholders on the ground and develop the infrastructure needed to bring Myanmar's rare earths to

market. New Delhi could also serve as a potential partner for Washington, allowing the US to gain access to Myanmar's rare earth supplies without requiring direct US involvement on the ground.

India's interest is driven by both economic and strategic considerations. Despite ongoing efforts to expand domestic refining capacity, India remains heavily dependent on China, which account for **more than 90 percent** of its total imports, to support its rapidly growing semiconductor and defence industries. This dependence exposes critical industries vulnerable to supply disruptions and constrains India's efforts to build resilient for critical mineral supply chains. Securing access to Myanmar's rare earth resources would therefore strengthen India's industrial base while giving New Delhi greater strategic leverage India's its competition with China.

India's growing interest in Myanmar's rare earth resources also forms part of its efforts to transform the long-neglected Northeast India into a **hub** for semiconductors and critical minerals. The Geological Survey of India (GSI) has **identified** the region as a major prospective source of rare earths. Access to Myanmar's deposits would complement, rather than replace, India's own domestic resources. The Northeast region also offers favourable conditions for downstream processing, including abundant **water resources** and better **air quality** than many of India's established industrial centres.

However, weak cross-border connectivity continues to constrain these ambitions. The

prolonged civil war has **stalled** the Kaladan Multi-Modal Transit Transport Project, which was intended to provide India's landlocked Northeast with direct access to the Bay of Bengal through Myanmar. These delays have further reinforced India's reliance on the strategically vulnerable Siliguri Corridor, making improving connectivity through Myanmar an even more urgent strategic priority.

India's geographic proximity to Myanmar, engagement with **EAOs** along the Indo-Myanmar border, and continued engagement with Naypyitaw give New Delhi an advantage over most external powers, except China, in expanding its presence in Myanmar's rare earth sector. However, Delhi has struggled to translate this advantage into logistical capabilities comparable to China's, which increasingly extend beyond Myanmar into the **broader region**. India has proposed reviving the historic Ledo Road to improve connectivity with Myanmar, but China has moved more **swiftly** to advance the initiative. The gap illustrates the limits of India's ability to translate strategic access into practical capabilities.

Recognising Myanmar's strategic importance, India has stepped up engagement with the local actors. New Delhi has recently intensified efforts to **deepen cooperation** with Naypyitaw, including in the rare earth sector recently. Most notably, Senior General Min Aung Hlaing **visited** India. This is his first bilateral visit to a major power following the highly controversial election. At the same time, the

Indian government has **reportedly** explored importing rare earths from KIO-controlled mines, particularly as relations between the KIO and Beijing have deteriorated amid the group's expanding military and political influence. This dual-track approach reflects New Delhi's effort to secure access to rare earth supplies while reducing its dependence on Chinese-controlled supply chains.

Myanmar's rare earth sector has emerged as an important arena of Sino-Indian competition, despite both countries' efforts to stabilise their relationship. The rivalry is no longer confined to traditional geopolitical flashpoints; it now extends to non-traditional geopolitical issues such as critical minerals and the resilience of supply chains. China holds significant advantages in Myanmar, but India's growing strategic interests and expanding engagement suggest that Beijing's dominance will not go uncontested. As the global competition for critical minerals intensifies, Myanmar may prove a crucial test of the strategic balance between Asia's two largest powers.

Kyi Sin is a Research Officer with the Myanmar and Thailand Studies Programme at the ISEAS – Yusof Ishak Institute in Singapore, where his research focuses on Myanmar's political developments, its relations with China and Thailand, and emerging cross-border security challenges, including the rise of cybercrime networks along Myanmar's borders. He has also examined the environmental and geopolitical consequences of unregulated rare earth

mining in Myanmar, including the toxic waste generated by these operations and the supply chain dependencies they create for China and the broader region. His analysis has been published in Fulcrum, Eurasia Review, and Think China, featured in CNA, and cited by several news agencies. He holds a Master's in Public Policy from the Lee Kuan Yew School of Public Policy at the National University of Singapore, a Master's in Contemporary China Studies from Renmin University of China, and a B.A. in English from Dagon University.

News Reports

Bilateral Relations

China Business Visa Rejections Surge For Indian Firms, Touching 95%

NDTV, August 20

Indian companies are facing sharply lower approval rates and increased scrutiny for Chinese business visas, disrupting executive and technical travel and pushing some meetings to alternative locations.

China President Xi Jinping's visit to Delhi opens a reset option

Deccan Herald, August 16

A potential Xi–Modi meeting at the BRICS summit offers India a chance to press China on border militarisation, trade imbalances and de-escalation, with border stability key to improving bilateral ties.

India Counters China, Maps 27 Places In Arunachal Using Official Names

NDTV, August 7

India has formally mapped 27 locations in Arunachal Pradesh using their official Indian names, rejecting China's repeated attempts to rename the disputed region and assert territorial claims.

Indian diaspora in China flags visa, social media concerns at embassy's first Open House in years

The Hindu, August 2

Indian professionals in China raised concerns over anti-India social media content, shrinking work visas and employment restrictions, prompting the embassy to strengthen support and consular services.

China and India in the Region

India, Japan sign maritime security pact as defense chiefs meet in New Delhi

Anadolu Agency, August 20

India and Japan signed a maritime security pact to deepen information sharing, operational cooperation and joint efforts to maintain a free and stable Indo-Pacific.

'Great scam': US after India named among 40 nations aiding China evade tariffs

Indian Express, August 15

The US has accused India and 40+ countries of helping China circumvent tariffs through transshipment networks and plans to use AI to detect and penalise such shipments.

Nepal halts Tibet academic conference after China objects

Nikkei Asia, August 10

Nepal's government cancelled an international Tibetan studies conference in Kathmandu after Chinese objections, sparking concerns over Beijing's influence and academic freedom in Nepal.

Bangladesh 'Outraged' With India Over Ex-Leader's Media Briefing

Bloomberg, August 6

Bangladesh has condemned India for allowing former PM Sheikh Hasina to address the media from New Delhi, saying it undermines efforts to repair strained bilateral ties.

Trade and Economy

India set to approve \$1.2 billion incentive plan to make building equipment, sources say

Reuters, August 21

India plans a \$1.2 billion incentive scheme to boost domestic production of high-tech construction equipment and reduce its reliance on China for critical machinery.

Inside India newsletter: Chip squeeze hits Chinese smartphones in India as Apple, Samsung gain an edge

CNBC, August 19

Rising memory-chip costs are squeezing budget Chinese smartphone brands in India, driving prices higher and shifting consumers toward premium players like Apple and Samsung.

China to keep imposing anti-dumping duties on Indian single-mode optical fibre imports

Reuters, August 13

China has extended anti-dumping duties on Indian single-mode optical fibre imports for another five years, maintaining tariffs of 7.4%–30.6% on Indian exporters.

China, India resume border trade at Nathu La after years-long suspension, signaling warmer engagement

Global Times, August 3

The reopening of the Nathu La Pass after six years signals improving China-India relations and renewed border trade cooperation, though its economic impact is expected to be limited.

Energy and Environment

China completes installation of 15,927 mirrors concentrating heat at 1,040°F at world's highest solar thermal plant; will power 50,000 homes while saving 60,000 tons of coal annually

The Times of India, August 15

China builds the world's highest solar thermal plant that could replace significant coal consumption and avoid carbon dioxide emissions.

India opens nuclear sector to proven foreign technology

Reuters, August 14

India has proposed a tightly regulated framework to open nuclear power generation to private and foreign investors, aiming to attract proven reactor technologies and expand capacity to 100 GW over two decades.

Russian share of India's oil imports surges to record high in July

Reuters, August 14

India's reliance on Russian crude hit a record 50.8% of oil imports in July, despite potential US sanctions, as Middle East supply disruptions drove refiners to maintain purchases.

India plans polysilicon incentives to reduce reliance on China

Reuters, August 7

India is preparing a production-linked incentive scheme to encourage domestic polysilicon manufacturing to reduce import dependence.

Analyses

India's Strategic Autonomy and the Politics of Distance from the West

Institute of South Asia, August 21

By C Raja Mohan, Honorary Senior Fellow at the Institute of South Asian Studies (ISAS)

India's "strategic autonomy" remains largely focused on maintaining distance from the US and West, while overlooking deeper dependencies on Russia and China that increasingly constrain its foreign-policy choices.

Digital infrastructure in South Asia: China's role and the potential for Australia–India cooperation

Australian Strategic Policy Institute, August 20

By Shruti Jargad, Visiting Fellow at the Australian Strategic Policy Institute (ASPI)

China's growing digital footprint in South Asia is accelerating connectivity but creating strategic dependencies, prompting India and Australia to promote diversified, resilient and locally owned digital infrastructure.

Why Xi Is Keeping India Guessing on the BRICS Summit

China Global South Project, August 11

By Derek Grossman, Non-Resident Fellow for the Asia-Pacific at China Global South Project (CGSP)

Xi Jinping's likely presence at India's BRICS summit despite Beijing's non-commitment, might potentially reinforce the China-India thaw while giving Xi leverage to press New Delhi on economic, strategic and diplomatic issues.

India's competitive coexistence with China

Lowy Institute, August 6

By Sanchari Ghosh, PhD candidate at the Department of International Relations, Jadavpur University, Kolkata

India is pursuing "managed rivalry" with China - deepening practical engagement and diplomatic channels while maintaining strategic caution, border deterrence and policy autonomy.

Books and Journals

Artificial Intelligence and Cybersecurity in Border Management: Reconfiguring Non-Traditional Threat Responses in the India-China Context

Strategic Analysis, April 2026

By Satish Irungbam, Senior Research Fellow (SRF) and PhD candidate in the Department of Political Science at the University of Delhi

This study examines the convergence of artificial intelligence (AI) and cybersecurity in India-China border management, with particular emphasis on the shift from Traditional Security Studies (TSS) to Non-Traditional Security Studies (NTSS). It critically analyses how AI-driven systems, such as the Comprehensive Integrated Border Management System (CIBMS), are reshaping national defence while raising concerns over surveillance overreach, algorithmic bias, and democratic accountability. Drawing on securitisation theory and the concept of surveillance capitalism, the study highlights how digital technologies function as instruments of power that can undermine civil liberties. The paper calls for a hybrid security paradigm that combines strategic deterrence with ethical governance to ensure the responsible deployment of AI in geopolitically sensitive regions.



Capsule Review

India's De-Risking Paradox: The Political Economy of Strategic Dependence on China Strategic Analysis, July 2026

Reviewed by Zhang Yu, student in the Master in Public Administration and Management programme at the Lee Kuan Yew School of Public Policy

The authors present a convincing account of a two-part paradox in India's effort to reduce its dependence on China. First, India's overall import structure appears to have become more diversified. However, much of this shift reflects the sharp increase in energy imports from Russia. Meanwhile, Indian manufacturing remains heavily dependent on Chinese intermediate goods, especially in strategically important sectors. Second, the Production-Linked Incentive (PLI) scheme has helped expand domestic production and assembly. Yet the scheme rewards output more than domestic value addition. As a result, firms may continue to rely on Chinese components even while producing more goods in India. An increase in "Made in India" production, therefore, does not necessarily translate into greater supply-chain independence.

The article draws on aggregate and sector-level trade data from 2003 to 2024. Its main contribution is not methodological sophistication but its demonstration that positive trends can cloud persistent vulnerabilities in specific industries.

However, some of the article's methodological and policy claims need to be treated with caution. The fact that PLI-supported production and imports of

Chinese intermediate goods increased at the same time does not prove that the PLI scheme caused higher import dependence. Rising domestic demand and broader supply-chain conditions may also explain this pattern. The use of a fixed 40 percent threshold to identify vulnerability also simplifies important differences between product categories. It does not fully account for factors such as substitutability, strategic importance or firms' ability to maintain inventories. Similarly, a bilateral trade deficit does not necessarily indicate strategic vulnerability. Imported inputs can also support domestic production and strengthen export capacity. In addition, inconsistencies in figure captions, HS codes and fiscal-year references make the empirical analysis less transparent.

Even with these limitations, the article adds value to debates on India's industrial policy and strategic autonomy. It shows why greater domestic assembly should not be equated with genuine supply-chain resilience. Reducing dependence on China requires more than a single incentive programme. It also depends on long-term industrial upgrading, higher domestic value addition and a broader range of suppliers for critical inputs.

Selected Literature for Next Issue's Capsule Review

Artificial Intelligence and Cybersecurity in Border Management: Reconfiguring Non-Traditional Threat Responses in the India-China Context

Strategic Analysis, April 2026

By Satish Irungbam

Strategic statecraft or symbolic coercion? A comparative study of trump's tariff doctrine in China and India

The Pacific Review, May 2025

By Mehmetali Kasim

Constraints and Potential Spaces of China–India Cooperation in the Arctic: A Structural and Situational Analysis

India Review, Jun 2026

By Gao Fei and Medha Bhardwaj

Capsule Review Submissions

China-India Brief invites concise review essays from LKYSPP students assessing recent and significant contributions to the literature.

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OTHER CAG PUBLICATIONS

- *Indira Gandhi and the Years that Transformed India* by Srinath Raghavan (Yale University Press, 2025)
- *Partnership or Polarization? Southeast Asian Security between India and China* edited by Evan Laksmana and Byron Chong (Contemporary Southeast Asia, 2023)
- *Asian Conceptions of International Order: What Asia Wants* edited by Kanti Bajpai and Evan Laksmana (International Affairs, 2023)
- *How Realist Is India's National Security Policy?* edited by Kanti Bajpai (Routledge, 2023)
- *Deterring Conflict and Preserving Peace in Asia* edited by Drew Thompson and Byron Chong (Centre on Asia and Globalisation, 2022)
- *What Can the United States Learn from China about Infrastructure?* by Selina Ho in *The China Questions 2* (Harvard University Press, 2022)
- *India Versus China: Why they are Not Friends* by Kanti Bajpai (Juggernaut Books, 2021)



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