ISSUE 254 1 APR 2025 - 30 APR 2025

China-India Brief

A publication of the Centre on Asia and Globalisation



Image Credit: Flickr/ITU Pictures, AI for Good Innovate for Impact

Guest Column

The AI Race: Positioning India and China in a Multipolar Tech World

By Sameer Patil and Sauradeep Bag

The Artificial Intelligence (AI) landscape is evolving rapidly, and 2025 began with a seismic shift: the launch of DeepSeek, a Chinese AI model that disrupted the American-dominated AI space. Its emergence was particularly significant, as it was developed despite US trade and tech **restrictions**, proving that AI innovation is no longer confined to regions with unrestricted access to cutting-edge hardware. This breakthrough lowers

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The *China-India Brief* is a bi-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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barriers to entry, signaling that other nations may soon follow suit, building their own AI ecosystems independent of traditional tech powerhouses.

A useful way to analyse this shift is through the lens of technology creators versus technology users—distinctions that often mirror the economic realities of developed and emerging markets. Developed economies, with their deep research and design (R&D) investments and established innovation ecosystems, continue to lead AI breakthroughs. Meanwhile, developing markets, characterised by rapid industrialisation and expanding consumer bases, have immense growth potential but still rely on external capital and expertise for AI development.

This divergence raises critical questions: Will AI creation remain concentrated in wealthier economies, or will the democratisation of AI tools allow emerging markets to become serious players? The coming years will reveal whether we are witnessing the fragmentation of AI leadership or the dawn of a more multipolar AI ecosystem.

Maturity and Momentum

The question posed above is undoubtedly important, yet it remains somewhat reductive and necessitates a more nuanced approach. While the democratisation of AI and its expansion across multiple nations is often seen as an unequivocal positive, it inherently introduces a critical new dimension: competition.

The competitive dynamics of AI development can be analysed through multiple dimensions, with two particularly crucial aspects standing out. First, the strength of a country's domestic market plays a significant role in shaping its AI trajectory. This includes not only the scale and maturity of its startup ecosystem but also the extent to which private enterprises are both developing AI solutions and integrating them into their business operations. A robust domestic market fosters innovation, attracts investment, and ensures that AI advancements actively contribute to economic productivity and industry transformation.

China's AI strategy has been driven by substantial government-backed venture capital **investments**, with nearly $912 billion allocated over the past decade—of which approximately 23 percent (around $209 billion) has been directed toward AI firms. This underscores Beijing's strategic intent to position itself as both a creator and a user of AI, leveraging state-backed funding to accelerate domestic innovation and industrial adoption.

India, by contrast, has yet to establish itself as a major AI producer but is rapidly emerging as a leading adopter of AI technologies. According to an IBM **report**, nearly 59 percent of IT professionals in India indicate that their organisations have

integrated AI into business operations, placing the country among the global leaders in AI deployment. However, at least for now, the contrast with China remains stark: while China is both developing and implementing AI at scale, India remains primarily a consumer rather than a creator of AI technologies. This difference in approach was recently highlighted by India's Commerce Minister Piyush Goyal, who **observed** that while India is building food and hyper-delivery apps, China is investing aggressively in AI and electric vehicles. Rather than viewing this as a critique of India's vibrant startup ecosystem, it may be more apt to see it as a reflection of the distinct developmental paths and national priorities of the two countries.

The second key dimension of competition lies in how governments are integrating AI into their capabilities, particularly in military operations and intelligence services. India and China are both integrating AI into their military strategies, but with differing focuses and levels of advancement. India is **leveraging** AI primarily for surveillance, reconnaissance, logistics, and cybersecurity, with notable developments such as AI-enabled drone swarms and the **launch** of seventy-five AI-based defence products. In contrast, China is making more aggressive strides in military AI, investing heavily in autonomous weapons, missile guidance systems, and AI-enhanced command structures. While India is steadily adopting AI in defence, China's advancements in autonomous warfare and decision-making systems suggest a more rapid and expansive military AI deployment.

Tech Giant

While China's lead in AI growth and adoption is undeniable, this should not be seen as an indictment of India's progress but rather as a testament to China's remarkable advancements in the field. The scale and pace of China's AI expansion reflect its strategic prioritisation of emerging technologies, backed by substantial investment and state support. This dominance extends beyond AI, spanning across multiple areas of tech innovation and reinforcing China's global rise.

The Australian Strategic Policy Institute's (ASPI) Critical Technology **Tracker** reveals China's significant advancements across various critical and emerging technologies. According to the tracker, China leads in thirty-seven out of forty-four technologies monitored, spanning sectors such as defence, space, robotics, energy, biotechnology, AI, advanced materials, and quantum technology. This dominance is further highlighted by China's research output: in certain technologies, all of the world's top ten leading research institutions are based in China, collectively producing nine times more high-impact research papers than the second-ranked country, often the US.

Indian Advantage

The emergence of DeepSeek has reignited discussions about global tech competition—whether in the context of US-China rivalry or the monopolistic tendencies of dominant AI models. For India, these advancements serve as valuable case studies—an indirect testing ground from which critical lessons can be drawn.

In recent years, the Indian government has sharpened its focus on AI development, through **substantial** funding commitments and policy initiatives. While DeepSeek demonstrated that the capital-intensive AI model dominated by the United States is not impervious to disruption, investment remains a fundamental driver of progress in this domain. For India to develop its own equivalent of ChatGPT or DeepSeek, a robust financial and institutional framework will be critical. However, India possesses a unique advantage: an expansive pool of young, highly skilled engineers who could form the foundation of AI innovation. This potential is further amplified by rising internet penetration and improving digital literacy, both of which could accelerate AI adoption and, in turn, create positive spillover effects for domestic AI development.

Furthermore, India's vast market size presents a compelling case for the development of an indigenous AI ecosystem. As AI adoption becomes increasingly widespread across various sectors within the country, the demand for domestically developed AI tools is both a strategic necessity and an economic opportunity. The intersection of a rapidly growing digital economy, a skilled workforce, and expanding technological infrastructure positions India as a potential leader in AI innovation and deployment.

For a country like India, the development of AI must be approached through multiple strategic lenses. While investment and talent cultivation remain crucial, a broader geopolitical and trade perspective is equally imperative. In an increasingly multipolar world, India has the potential to emerge as a leading tech power, particularly within the Global South—an ambition it has previously demonstrated through initiatives such as its G20 presidency in 2023. To translate this vision into tangible outcomes, India must prioritise the development of an indigenous AI model capable of competing with leading global counterparts. This would enable it to transition from being merely an adopter of foreign technologies to a producer and provider of cutting-edge AI solutions. Given its vast talent pool, growing digital infrastructure, and expanding AI ecosystem, India possesses the requisite resources to achieve this objective.

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Guest Column

India's China Policy Risks Missing a Golden Opportunity Amid Trumpian "Reciprocal Tariffs"

By Mao Keji



Image Credit: Wikimedia Commons/wiki_Press Information Bureau, Government of India/

In October 2024, **a breakthrough summit between Chinese and Indian leaders** finally eased longstanding border tensions, and by March 2025, **both nations issued positive remarks about their bilateral ties**—something unseen in years. **The warming of China-India relations** sparked hopes of **restarting long-stalled Chinese investment projects in India**. However, as Trump wielded his "reciprocal tariffs" stick in early April, the fragile thaw in Sino-Indian relations has been clouded by uncertainty.

On April 7, India's Commerce and Industry Minister Piyush Goyal **accused China of undermining the global economic order** through unfair trade practices. Four days later, Goyal doubled down, **claiming that allowing China into the World Trade Organization (WTO) was the root cause of today's global trade crisis**, while praising Trump's tariffs as necessary and beneficial to the world, presenting a golden opportunity for India's trade ambitions. Foreign Minister S. Jaishankar also joined the fray, alleging that **'Chinese dumping' has sparked widespread anger in India**.

These statements reveal the Modi government's haste to align with Trump's agenda on tariffs. This approach has once again cast a long shadow over Sino-Indian ties stalling the economic collaboration that had only recently begun to warm. More significantly, just as India misjudged the "China+1" trend in 2020, it seems poised to repeat the same miscalculation, missing yet another development window.

I. How Does India View Trumpian "Reciprocal Tariffs"?

India's think tanks, academics, and media have coalesced around two interpretations of Trumpian tariffs. Optimists argue that India's key exports to the US—pharmaceuticals and services—so far remain unscathed, and the US tariff rates for India are lower compared to those for Vietnam or Bangladesh, and certainly China, Trump's primary target. With China under immense pressure, they suggest, Beijing might seek cooperation with India, offering capital inflows and technology transfers in return. Thus, aligning with Trump would position India

advantageously, even allowing it to emerge as a major beneficiary.

Pessimists see the tariffs as a death knell for trade liberation, preventing India from following China's path into lucrative Western markets through manufacturing and exports. But India still risks sharing China's fate of punitive tariffs. Viewing the US as the decisive force in shaping India's prospects, they echo **Jaishankar's complaint about Western favouritism toward China**. By criticising China, they demonstrate conformity to Washington, hoping for exemptions or concessions.

Notably, both fundamentally overestimate current US strength and underestimate China's and other economies' ability to counterbalance. This explains the hawkish rhetoric from Goyal, Jaishankar, **and even Defense Minister Rajnath Singh**. As commentator Pranab Dhal Samanta observed, **"any chaos is an opportunity for new power centres to emerge."** These officials perhaps seek to leverage Trumpian chaos to counter China, and secure diplomatic and economic benefits.

Echoing these statements, Indian government agencies have sprung into action. The Bureau of Indian Standards (BIS), for instance, **relaxed quality control orders (QCOs) on automotive parts, synthetic fibres, and chemicals**—directly addressing US concerns—while maintaining stringent regulations specifically against Chinese products. While India lodged a WTO complaint against US tariffs on its steel and aluminium, **it limited the move to "procedural consultations" to avoid antagonizing Washington**. Meanwhile, India's Directorate General of Trade Remedies (DGTR) is reportedly **planning new anti-dumping investigations against China**. Most significantly, **India is pursuing a first-phase trade deal with the US**, in an open attempt to hedge against China's counterstrike.

II. Why Might India's Calculations Be Wishful Thinking?

India's optimism stems from two factors: its exports to the U.S. account for just 2.3 percent of its GDP, many of which (like iPhones) have low domestic value addition, and the belief that India is not a primary tariff target. Former IMF executive director Surjit S. Bhalla argued that **the true aim of the tariffs is not to balance trade deficits, but to suppress China**, presenting India with a historic opportunity. Yet, these assumptions underestimate the tariffs' risks, while overestimating India's chances of success.

India underestimates the destructive nature of tariffs. Even if China cedes market share in the US, manufacturing powerhouses like Vietnam and Malaysia, or countries closer to the US like Canada and Mexico, are better positioned to negotiate favourable trade terms. However, Indian service exports, particularly IT, could suffer greatly amid US economic turbulence. Financial risks are also significant—global market volatility typically drives capital flight from high-risk emerging markets, exposing India to

prolonged financial stress. Furthermore, profit margins for Indian firms could face severe pressure from diminished global demand coupled with redirected competition from Chinese goods originally bound for the US.

The Modi government also overestimates India's leverage. Sharing US frustration over trade deficits with China and concerns about its rise, India has embraced Trumpian logic, fostering false confidence. **Trump's claim that "the more you import, the stronger your bargaining power" suggests that the US**, with its large imports from China, holds a stronger negotiating position—an advantage India believes it too possesses over China. However, this logic falters in practice. As a surplus nation, China's loss translates to loss of sales revenue, which is relatively easy to adjust. Meanwhile, India, a deficit nation, struggles to domestically substitute competitively priced imports. After all, shifting manufacturing capacity across borders is far more complex than simply redirecting orders.

III. Why Could India Miss Yet Another Development Opportunity?

Over the past two decades, India has missed two key opportunities for manufacturing growth. In the early 2000s, as China's low-end manufacturing shifted abroad due to rising costs, India, fixated on services, barely took notice. Later, amid U.S.-China tensions and the COVID-19 pandemic, multinational firms pursued a "China+1" diversification strategy. India took steps, but these ultimately backfired.

In early 2020, fearing "predatory foreign acquisitions" during the pandemic, **India issued Press Note 3**, restricting investments from China. Following the Galwan Valley clash in June 2020, **India began intensifying its scrutiny of Chinese firms, arresting several Chinese executives on accusations related to tax evasion and money laundering, imposing tariffs on Chinese imports**, and **banning hundreds of Chinese-linked mobile apps over "national security" concerns**. Despite expecting to benefit from the "China+1" strategy, India's policy moves have only led to significant disappointments.

Now, with Trump's tariffs offering a third chance, will India seize it? The prospects remain dim.

First, "political correctness" continues to distort economic rationality. India has yet to resolve a fundamental question: Does it want to cooperate with China? Goyal's rhetoric suggests that betting against China and singing its decline aligns with India's version of "political correctness." **Only during a brief window in February 2025, after Modi's US visit faltered, did India briefly consider improving ties with China**. With Trump's tariffs, India has eagerly followed Washington's lead in confronting China. Economic logic suggests that closer Sino-Indian cooperation would better position India to pursue its dream of industrial take-off, but domestic politics

stifle this possibility. As seen since 2020, rejecting Chinese capitals and talents, India cannot benefit from Chinese industries relocating under US pressure. This will be a failure of both economic wisdom and political courage.

Second, entrenched policy constraints remain formidable. Despite its vast low-cost labour force, India's exports are dominated by capital-intensive goods, reflecting severe distortions that prevent the country from leveraging its greatest comparative advantage. While Modi's first two terms pushed labour, land, and agricultural reforms, progress has been lacklustre. For instance, **India's efforts to consolidate labour laws into four codes have stalled due to the lack of implementation guidelines**, rendering the reforms toothless. In Modi's third term, with reliance on a coalition government, reform momentum has waned further. Even if New Delhi resolves to accommodate Chinese investment, longstanding barriers to manufacturing growth will not simply dissolve.

Third, competition within the region is fierce. Given India's restrictions on Chinese investment and sluggish domestic reforms, Chinese entrepreneurs—facing obstacles in securing FDI approvals, obtaining visas, or navigating compliance risks, and fearing hurdles in profit repatriation—often bypass India. Meanwhile, a supply chain network has been taking shape from China to Southeast Asia, South Asia, and the Middle East—Bangladesh handles **apparel**, Vietnam focuses on **consumer electronics**, Indonesia on **batteries and refined products**, and Malaysia on **automobiles, chips, and electronic manufacturing services**. More recently, China and Vietnam **signed a historic memorandum to strengthen supply chain cooperation in response to US tariffs**, with potential expansion to Bangladesh and Sri Lanka. As a result, India may face intensifying competition in its economic niche, further squeezing its development prospects.

India's missteps risk repeating history, squandering a critical moment to redefine its economic trajectory.

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Bilateral relations

China, India reportedly to resume pilgrimage to Xizang region, a 'phased achievement' after six-point consensus: expert

The Global Times, April 18

Considered a "phased achievement," India and China have agreed to resume Indian pilgrims' visits to the sacred mountain and lake of Xizang in China, starting in 2025.

Amid Trump's Threats, China Issues 85,000 Visas To "Indian Friends"

NDTV, April 15

The Chinese embassy has issued more than 85,000 visas in just over three months this year, alongside several measures aimed at facilitating smoother travel between the two countries.

India's new submarine base targets China's growing sea power

South China Morning Post, April 13

India is set to open a new naval base in Andhra Pradesh, highlighting efforts to expand its underwater fleet and counter China's influence in the Indian Ocean.

India overhauls teaching in Himalayan Buddhist monasteries to counter China

The Straits Times, April 8

"We are trying to inculcate Indian identity through education along with Buddhism to make sure China can never control our monasteries in the Himalayas," said Maling Gombu, a Buddhist worker of the ruling Bharatiya Janata Party (BJP).

China and India in the Region

'Closely following situation': China backs Pakistan, advocates 'impartial probe' into Pahalgam terror attack

Times of India, April 28

China has expressed support for Pakistan and called for an impartial investigation into the Pahalgam terror attack that killed twenty-five Indians and one Nepalese citizen, urging both India and Pakistan to exercise restraint and de-escalate tensions.

India edges closer to China, hedging against Trump's unpredictability

The Washington Post, April 18

Analysts said India was forging closer ties with China—seen more as a "slow and tactical shift" than a true realignment—to increase its strategic manoeuvrability and flexibility in dealing with the United States.

China's plan for world's biggest dam a mega-disaster for India

Asia Times, April 5

China's plan to build the world's largest dam on the Brahmaputra River raises concerns in India over potential impacts on water security and geopolitical dynamics in South Asia.

India and Sri Lanka set to sign defence pact amid China's rising regional clout

South China Morning Post, April 3

Indian Prime Minister Narendra Modi's visit to Sri Lanka aims to boost defence and economic ties, seen as a move to counter China's growing influence on the island nation.

Trade and Economy

US seeks India Trade Deal on E-Commerce Crops and Data Storage

Bloomberg, April 25

Negotiations are underway for a trade agreement between the United States and India covering nineteen categories, including greater market access for agricultural products, e-commerce, data storage, and critical minerals.

Beijing warns countries not to act against China in trade deals with US

Financial Times, April 21

Amid the escalating trade war between the US and China, China has warned third countries against striking US-led trade deals that could isolate Chinese goods.

China says it's ready to open market to import more Indian goods, urges 'non-discriminatory' stance for its firms

Economic Times, April 19

China's ambassador to India said that Beijing wanted to support an "inflow of premium Indian goods" into China and wanted to help Indian businesses tap into China's consumer market, in exchange for more transparency for Chinese businesses operating in India.

China's leader ends Southeast Asia tour touting Beijing's reliability vs. US tariff threats

Associated Press, April 18

Chinese leader Xi Jinping's whirlwind tour of three Southeast Asian nations was timed to position China as a reliable partner and source of stability amid US threats of reciprocal tariffs against the region's economies.

China to deepen cooperation in 6G with EU, South Korea, and India: MIIT official

Global Times, April 18

China is taking more concrete measures to lower barriers to foreign investment in the telecommunications sector, deepening 6G cooperation with the EU, South Korea, and India.

Global Funds Tout India as Haven in Trump Tariff Chaos

Bloomberg, April 13

As the US-China trade war intensifies, global investors are turning to Indian assets, with India's stocks and bonds outperforming regional peers, while its large domestic economy and conciliatory trade stance position it to benefit from shifting global supply chains.

Energy and Environment

Goodbye Tesla-BYD leads the global electric vehicle market for the first time in history

El Adelantado, April 19

In 2024, Chinese automaker BYD has overtaken Tesla as the world's top electric vehicle seller, driven by competitive pricing, strong sales in China and India, and vertical integration.

Donald Trump's policies could give China the lead in global energy race, say experts

Financial Times, April 17

Trump's trade actions could impact US oil exports, but are unlikely to affect China's clean tech dominance, potentially allowing China to replace the US as the world's leading energy power.

China has world's first operational thorium nuclear reactor thanks to 'strategic stamina'

South China Morning Post, April 17

China has activated the world's first operational thorium nuclear reactor, a safer and less scarce alternative to uranium, marking a significant milestone in clean nuclear energy development.

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India's oil and gas production fall in 2024-25

Energy World, April 19

Declining output from mature oil and gas fields in India has resulted in a 2.5 percent decrease in crude oil output and a 1 percent decrease in natural gas production.

25GW of renewable energy capacity installed in FY25: Pralhad Joshi

The Mint, April 1

India achieved record growth in renewable energy capacity in FY 2024/2025, with a 35 percent increase from the previous year, but still needs to accelerate installations to meet its 2030 targets.

Analyses

Friends with Limits: The Future of Russo-Indian Defense Ties

War on Rocks, April 25

By Daniel S. Markey, a senior fellow at the Foreign Policy Institute, Johns Hopkins School of Advanced International Studies and formerly a senior advisor at the U.S. Institute of Peace, and David Brostoff was formerly a South Asia research analyst at the U.S. Institute of Peace.

Despite growing China-Russia ties, Russo-Indian defense cooperation persists within clear limits, highlighting the complexities of a multipolar world that US policymakers must learn to navigate.

Can India And China Be Friends? The Best Time For These Asian Giants To Find Common Ground Is Now

ETV Bharat, April 19

By Brigadier Rakesh Bhatia, a former Indian army officer with over three decades of experience in military intelligence

A closer relationship between India and China could act as a powerful counterbalance to US economic aggression, even if deep mistrust prevents a full rapprochement.

How China can help Bangladesh escape India's foreign policy grip

South China Morning Post, April 13

By Asma Khalid, independent researcher and former visiting fellow at the Stimson Center

Infrastructure investment, technology transfer in manufacturing, and diplomatic support for Bangladesh's ASEAN ambitions could help China pull Bangladesh closer and distance it from India.

Just a thaw is not enough, India and China need to turn the page on past

The Times of India, April 6

By Zorawar Daulet Singh, historian and author of 'Powershift: India-China Relations in a Multipolar World'

Despite the lasting power asymmetry between India and China, India should work toward a stable relationship with Beijing, as the current geopolitical climate demands not just a thaw, but a full rapprochement.

China and India Haven't Patched Things Up on the Border

Foreign Policy, April 3

By Sushant Singh, a lecturer at Yale University and a consulting editor with India's Caravan magazine

While India-China ties have begun to thaw, progress has been limited, with the fundamental border issue remaining "sensitive but stable," where a "degree of standoff still prevails."

A New Triangle: The Interplay Between China and EU-India Relations

Asia Society, April 1

By Philippe Le Corre, Senior Fellow on Foreign Policy, Center for China Analysis

As the global order becomes more multipolar, the EU will increasingly depend on India to counterbalance China's rise and navigate the Indo-Pacific, making the EU-India partnership a complex yet promising opportunity for both sides.

Books and Journals

Review of the QUAD Role in India–China Relations

East Asia, April 2025

By Srinivas Junuguru, Assistant Professor at Centre for Public Policy Research, School of Liberal Arts and Humanities, Woxsen University, Hyderabad, Telangana, India



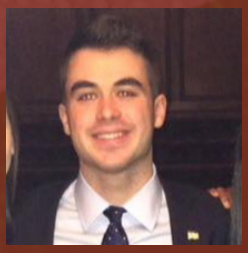
India and China are the two fastest-growing leading geo-economic powers in contemporary international relations. Although these two major Asian powers cooperate on various bilateral and multilateral aspects of international relations, they continue to be faced with several other long-standing challenges and issues. India has, thus, been manoeuvring its foreign policy tools to balance China's sway, as well as establishing and joining various international groups to counter China's influence in India's strategic areas. Similarly, China is also adopting the same strategy to limit India as much as it can. Keeping this context, India joined the QUAD (Quadrilateral Security Dialogue) group. It is a voluntary group of countries comprising India, Australia, the USA and Australia. Notably, China continues to object to India's association with the QUAD. The research paper expounds on why India became a member of the QUAD. This qualitative study aims to scrutinize the influence of the QUAD in India–China relations and the future of the QUAD.

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OTHER CAG PUBLICATIONS

- *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)
- *Winning the Fight Taiwan Cannot Afford to Lose* by Drew Thompson (Strategic Forum, 2021)
- *Routledge Handbook of China–India Relations* edited by Kanti Bajpai, Selina Ho and Manjari Chatterjee Miller (Routledge, 2020)

Compiled and sent to you by Centre on Asia and Globalisation and the Lee Kuan Yew School of Public Policy, National University of Singapore

China-India Brief is supported by Wilmar International Limited

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