

A US-India partnership for the AI age

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Artificial intelligence has moved from Silicon Valley to the center of global politics and economics. It is now the primary theater of 21st-century strategic competition, shaping everything from weapons systems to scientific discovery, while fundamentally restructuring labor markets. The country — or partnership — that scales up AI development and adoption will command the geopolitical high ground.

In this respect, no bilateral relationship is more consequential than the one between the US and India. After a tense episode last year, when tariffs and other slights rankled political leaders on both sides, the US and India announced an interim bilateral trade agreement this February. Both countries now have a major opportunity to cooperate more closely on AI. But they must move beyond the rhetoric of shared values to building shared infrastructure. Together, they can define the standards, supply chains and security protocols of the AI age before their adversaries do.

Technology has long been the connective tissue of the US-India relationship, though

the nature of the bond has changed over time.

The US recognizes that to win the global AI adoption race, AI diplomacy must be a core instrument of its statecraft. In this context, India is not a junior partner but a strategic multiplier. Although the US maintains a decisive edge in frontier models and high-end compute, China has proven that its capacity for innovation is a force to be reckoned with. To counter this, the US needs the talent and dataset scaling that

only India can provide.

India offers more than just a massive market. It provides population-scale datasets drawn from almost 1.5 billion people, making it a vital theater for testing AI in real-world environments. Moreover, with an AI talent pool projected to exceed 1.25 million by 2027, India

provides the intellectual heft and human capital required to sustain a high-tempo innovation cycle.

With billions of dollars in committed investments from Google, Microsoft and Amazon to build AI hubs across India, the goal is clear: to ensure that US-designed technology forms the backbone of the Global South's largest economy. If the future



of the digital world is built on US-Indian infrastructure, the world will remain open and secure. But if it is built on China's proprietary technology stack, the global order will fracture.

Potential, however, is not the same as proficiency. While India's talent pool is vast, much more must be done to match skills to specific AI tasks. Bridging this gap should be seen as a US imperative. Integrating Indian talent into US-led ecosystems is the only way for American firms to maintain their edge against a competitor that views technology as a tool of state control, rather than a means of individual empowerment.

To turn the current US-India momentum in AI into a permanent strategic advantage, both countries must focus on four priorities. First, they should develop joint AI applications that can help establish a firewall against digital dominance by malevolent powers. Linking India's burgeoning startup ecosystem with the technological tools and capital available in the US can create common solutions for an array of global challenges.

Second, the two countries can cooperate in constructing resilient infrastructure

and supply chains. Their efforts should encompass not only critical minerals and semiconductors, but also undersea cables, open telecommunications networks and data centers.

Third, India and the US will need to collaborate on creating a seamless, high-skill ecosystem for talent. With rising anti-immigrant sentiments in the US and many other countries, this will require navigating potentially treacherous political territory.

Lastly, to enable all the above, India and the US must align their technological standards, intellectual property rights and cybersecurity policies far more than they do today. Translating shared values into common agendas is the only way to reduce bilateral friction and accelerate cooperation.

Deepening US-India cooperation on AI and other security matters is necessary but not inevitable. Strategic priorities may align in many areas but will invariably differ in emphasis. Still, the importance of the US-India AI partnership should not be underestimated. By combining American innovation with Indian scale, the two countries will not just participate in the AI age — they will define it.

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