

Beyond Jamnagar: Energy diplomacy can help reset India-US ties

Energy cooperation emerges as a potential bridge between India and the US, even as longstanding differences remain unresolved



Rubio's visit to Jamnagar was a major plus for Reliance and India. He termed the country "a refining superpower", which was music to Indian ears. (X: @USAmbIndia)

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In a rare development, US Secretary of State Marco Rubio visited India from October 20–22, after his previous visit in May. This time, he covered Mumbai and Jamnagar, having travelled to Kolkata and Delhi earlier.

Two photographs defined the contours of the second visit — one showing Rubio and US Ambassador Sergio Gor with India's external affairs minister and foreign secretary in Mumbai, and the other showing the US duo with Mukesh and Anant Ambani, CMD and ED respectively of Reliance Industries Limited, in Jamnagar. The second photo seemed to have drawn greater attention. This visit was no doubt about conventional diplomacy, but it was perhaps more about public diplomacy and economic diplomacy.

The backdrop

The visit was important because Rubio, besides being the secretary of state, is also the national security adviser and a potential Republican candidate for president or vice president in the 2028 elections.

Above all, this time his meetings in India represented a stage to evaluate the trajectory of India–US relations since the Trump administration began its second innings in January 2025.

In the background of steady bipartisan support for a strong India–US partnership during the previous 25 years, optimism prevailed. Even before the second term began, India’s External Affairs Minister S. Jaishankar confidently stated in November 2024 that many countries were nervous about (a Trump-led) US, but added that “India was not one of them.” Prime Minister Narendra Modi’s visit to Washington in February 2025 strengthened hopes that a natural convergence between ‘Make America Great Again’ (Maga) and ‘Make India Great Again’ (Miga) would bring the two countries closer together.

However, things changed quickly. In the subsequent year-and-a-half, Washington and New Delhi drifted apart. They did not find themselves on the same page on a long list of issues, comprising Pakistan, China, Ukraine war, Iran conflict, tariffs and trade deal, visa question, Russian oil, G20, Brics, and the Global South-related issues.

Rubio’s visit in May 2026 helped somewhat in expanding mutual understanding on some of these issues. However, since then, Washington and Beijing deepened their proximity, as exemplified by the Trump-Xi summit in September. Besides, the Graham Act 2026, additional restrictive measures on H-1B visa, and Trump’s continuing claim of ‘mediation’ that ended the India–Pakistan conflict aggravated bilateral tensions.

Rubio’s achievements

The US Embassy in Delhi must have been tired of frequent criticism in the Indian media in recent months and decided to do something about it, because Indian experts had begun pointing to the glaring gulf between the Embassy’s positive projection of the relationship and Washington’s actions that seemed to hurt India. What better than to bring a familiar political heavyweight from the US capital? And it so happened that Rubio was willing to find time, especially because US national interest dictated that deeper energy cooperation be developed between India and the US.

By choosing Mumbai and Jamnagar for his itinerary, the US side succeeded in focusing attention on a whole range of issues relating to trade, investment and energy cooperation. In addition, by making himself available for several full-fledged interviews and other interactions with media persons, Rubio leveraged the opportunity to put across the US perspective in a clear and candid manner, with primarily Indian audiences in mind.

On China, for example, he disagreed with a journalist who noted (rightly) that the US had turned “soft”. Rubio observed that the US aimed to attain “a level of strategic stability” with China and to avoid a US–China trade war that would be devastating to the rest of the world.

On Pakistan, he was not defensive. Without referring to close personal chemistry between President Trump and General Asif Munir, Rubio insisted that the US needed “to have a relationship with Pakistan”, while reiterating the traditional position that it was not at the expense of India.

On H-1B visa issues, he clarified that the US was in the midst of “fixing” its visa system, and that India was not specifically targeted in this context.

To those who bemoaned the slow death of the Quad due to the changed US policy approach towards China, Rubio expressed support and enthusiasm for the Quad framework, adding that a leaders' summit was planned to take place in November, on the sidelines of the ASEAN summit in Manila. He expected the summit to produce deliverable results.

However, the timing is yet to be finalised. Besides, with China's leader sitting in the main conference room, possibly confabulating with ASEAN leaders, participants in the Quad summit, if it takes place, will need to choose their collective pronouncements with utmost care. Washington may be unwilling to wreck the ongoing progress in strengthening its ties with Beijing.

Concerning the US–India trade agreement, the visiting dignitary assured that it was “incredibly close”, and that it was only a matter of weeks, not months, before it gets signed. Optimists were happy to hear this. Sceptics recalled that US officials gave a similar assurance a few months back!

Pragmatists argued that India must observe patience, noting that without an agreement, the duty on Indian exports to the US that is currently 10 per cent, would increase to 18 per cent after the trade agreement is concluded.

Energy issues

Several domain experts have explained how global energy trends have been impacting the US and others negatively, especially at a time when midterm elections for the Congress are imminent. Washington's decision to hold back on enforcing the Graham Act and conclude a diesel agreement with Russia need to be viewed in this context.

Rubio's brief for the Jamnagar leg of the visit was to explore and urge that India, through Reliance and other companies, buy more Venezuelan crude in future. Very few countries have refineries in the world that can process this high sulphuric crude, but India is one of them. Linked to this, is the other US request to India: end or reduce the import of Russian oil. This is a complex matter. Experts broadly agreed that, subject to technical and price factors, India could increase the intake of Venezuelan oil, but it would be unwilling to oblige the US on the second request.

Regardless of immediate outcomes, Rubio's visit to Jamnagar was a major plus for Reliance and India. He termed the country “a refining superpower”, which was music to Indian ears. Explaining the rationale of his visit to Jamnagar, Rubio stressed that energy was clearly a national security issue.

Prospects

Many Indian observers have noted the US role in generating tensions and strains in the relationship with India. A recent column by a former Indian ambassador to the US drew considerable attention; US officials are amply aware of all this, but they continue to project a positive view of the relationship. Asked how he saw the India relationship, Rubio emphasised that it was “positive, and in many ways”. On the other hand, a leading scholar, with known political orientation, argued that there was “an overt downturn in ties for sure, but beneath the surface, there is optimism for collaborative progress”.

Mukesh Aaghi, president and CEO of US–India Strategic Partnership Forum, noted that the politics of Trump and Modi may be different, but there is “a sense of maturity and stability between them and (therefore) a special relationship continues”. If so, the forthcoming meetings between the two leaders in Manila and Miami are potentially significant opportunities for the two governments to stabilise and strengthen bilateral relations. They can ill afford a rocky ride in 2027.

Secretary Rubio’s second visit to India has already made a constructive contribution to this process.

(Rajiv Bhatia is a Distinguished Fellow at Gateway House and a former ambassador. He served as High Commissioner to South Africa and is the author of three books on India’s foreign policy. Views expressed in the above piece are personal and solely those of the author. They do not necessarily reflect Firstpost’s views)