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Analysis
Paper

52/2025 02/09/2025

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Indo-Pacific 2025: strategies, cooperation, and competition



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This analysis is part of the *Strategic Vision 2025.*
Issued in March 2025

Abstract:

This article explores major events in the Indo-Pacific over the past two years, with a special focus on the economic and security aspects shaping relations between key players in the region.

Interest in the Indo-Pacific has reached unprecedented heights among the world's major powers, which consider the region a priority area. The optimism that characterized the "Kissinger order", with its vision of a fully globalized world, has given way to a scenario marked by the resurgence of the struggle between great powers. This new context poses the challenge of coexistence between a hegemonic power, the United States, and an emerging one, China. In this framework, the Indo-Pacific has become a central scenario of rivalries and convergences, with an intricate network of interests and ambitions that shape the main realignments of our time. Returning to the terminology of the 19th century, we would be facing the contemporary version of the "Great Game".

The study will focus on the major economic powers of the Indo-Pacific: the United States, China, India, Japan and South Korea. It will also include a mention of North Korea and the Philippines because of the risks that characterise their security contexts.

Keywords:

Indo-Pacific, China-US rivalry, India, Japan, Belt and Road Initiative, Geopolitics, Great powers.

How to cite this document:

BORREGUERO SANCHO, Eva. *Indo-Pacific 2025: Strategies, Cooperation, and Competition*. IEEE Analysis Paper 52/2025. IEEE web link and/or bie link[(3)] (consulted day/month/year).

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Introduction

From the 1970s onwards, the US facilitated China's economic rise in exchange for China's tacit acceptance of its global military hegemony. It was the so-called "Kissinger order[1] " that followed the end of the Cold War and ushered in a new one based on faith in globalisation that ushered in the "end of history", to use Francis Fukuyama's expression. This new order began to crack in the second decade of the 21st century, under the leadership of Xi Jinping and Donald Trump.

Using Michael Mann's terminology[2] - the four sources of social power - it could be argued that, in its approach to China, Washington pursued a separation of interests in the spheres of *economic* and *military power in the* belief that they would develop autonomously, without mutual interference and in watertight compartments. China's inclusion in the liberal economic order was expected to lead the country towards a transition to democracy - *ideological* power - and full adherence to international institutions - political power. Neither Nixon nor Kissinger foresaw the trajectory that the Chinese Communist Party (CCP) took. Despite the economic leap that led it to become the world's second largest economic power, Beijing not only failed to embrace the political ideals of liberalism, but under the “new era” of Xi Jinping began an authoritarian and personalist drift reminiscent of the Mao Zedong era. It created a series of global institutions in competition with those embraced by the "Washington consensus" and, in the sphere of military power, began to flex its muscles in the Taiwan Strait, the South China Sea and the border with India.

It is against this backdrop that Indo-Pacific strategies and partnerships emerge. Australia, the US, ASEAN, India, Taiwan, Japan and South Korea will publish a series of papers that highlight the region's dilemmas and the unfolding of a new geopolitics that has at its core the rivalry between an emerging power, Beijing, and a hegemonic power, the United States. These state actors hold different views on the regional balance of power, a diversity that is reflected in the realist, liberal and constructivist approaches that explain priorities and concerns.

[1] Rachman, G. (2019). The Asian strategic order is dying [online], *Financial Times.* Disponible en: https://www.ft.com/content/f4725b7e-b51e-11e9-8cb2-799a3a8cf37b
[2] Mann, M. (1991). *The sources of social power*. Madrid, Alianza Editorial.

The US-promoted Quadrilateral Security Dialogue (Quad), India's *Act East Policy*, Japan's Partnership for Quality Infrastructure (PQI) plans, the Asia-Africa Economic Corridor, Australia's "dependent ally" relations with the US, and Malabar's trilateral naval exercises, among others, all seek to contain China's growing influence[3] . China's plans to increase its influence through the Maritime Silk Road challenge conventional US protagonism in the region, and the *2019 ASEAN Perspectives on the Indo-Pacific*, an example of a constructivist approach, emphasises an inclusive, rules-based Indo-Pacific.

The European Union has not remained oblivious to these transformations. Its incorporation into the Indo-Pacific represents a transition from "Europe does not do geopolitics" to the development of a grand strategy for external action that, among other things, includes the *global gateway*. This shift, which starts with the European Commission's 2019 strategic perspective and defines China as a partner, competitor and systemic rival, received an abrupt boost with the COVID-19 pandemic and Russia's invasion of Ukraine. Both events affected the prevailing perception of China, especially when Beijing's response to the war in Ukraine was interpreted as tacit support[4].

Other EU turning points include the EU's Strategic Compass and the 2021 EU Strategy for Indo-Pacific Cooperation. If the initial approach proposed the EU as a "third way" away from great power competition, over time it has abandoned this stance and aligned itself with Washington's recommendations. The realignment became evident with the arrival of Joe Biden in the White House, when the EU suspended the Global Investment Agreement previously negotiated with China, marking a new strategic distancing.

As a result, the EU has entered a phase of collaboration with the so-called "like-minded countries" of the Indo-Pacific, a security-focused regrouping of economic, ideological and political interests in which it participates alongside the United States, Japan, South Korea, Australia, New Zealand, the Philippines and India.

In this vein, recent EU proposals include the Enhanced Security Cooperation in and with Asia (ESIWA) project and the EU-Japan strategic partnership. However, like other economies, Europe faces the complex challenge of balancing the advantages of trading

[3] Josukutty, A. and Sabina Lobo, J. (eds.) (2024). *The New World Politics of the Indo-Pacific: Perceptions, Policies and Interests*. London, Taylor & Francis Group.
[4] Sabanadze, N., Vasselier, A. and Wiegand, G. (2024). *China-Russia alignment: a threat to Europe's security* [online]. MERICS. [Accessed: 2025]. Available at: https://merics.org/en/report/china-russia-alignment-threat-europes-security

with China against the security downsides. The "*de-risking*" approach to the production of digital technologies clashes with China's dependence on China for the supply of critical minerals, while European import controls generate retaliation from Beijing. The interconnectedness of globalisation and China's centrality in production chains make decision-making difficult, opening gaps between EU partners, whose views and preferences often diverge.

Although the EU continues to define China as a partner, competitor and rival, in practice it is becoming less of a partner and more of a rival.

This article analyses the main trends and developments in the Indo-Pacific with a special focus on the economic and security aspects that shape relations between the region's key players. The study will focus on the major economic powers: the United States, China, India, Japan and South Korea. It will also include mentions of North Korea and the Philippines due to the risks that characterise their security contexts.

The United States, continuity and rupture

"The US is an Indo-Pacific power". With this laconic and forceful statement begins the Indo-Pacific strategy approved by the Biden Administration in 2022. Indeed, part of the US is located in the Pacific Ocean - the west coast, the Hawaiian Islands and Alaska to the north -. It also has an extensive presence in the region as a hegemonic power. Washington has signed eleven security and defence treaties, most of them bilateral (with South Korea, the Philippines, Thailand, Japan, Australia and New Zealand), but also collective, such as the Quad, AUKUS, the Five Eyes Alliance, and the Southeast Asia Collective Defence Treaty. In addition, it has military bases in Japan, South Korea, Guam, Hawaii and Alaska. It has a regular military presence in the Philippines, Singapore, Australia and the Marshall Islands, and military partnerships in rotation with Indonesia, Papua New Guinea, East Timor, New Zealand and Thailand.

The US made a significant shift in its foreign policy towards Asia under the Obama Administration, with the famous *pivot to Asia*. The strategic shift was articulated by Hillary Clinton, who identified the Asia-Pacific as a vital region for the US. During Donald Trump's tenure, the 2017 Indo-Pacific strategy was published. The national security strategy also defined the Indo-Pacific as the region of greatest strategic interest to the US.

The Trump administration went further and singled out China as a threat to US objectives. In this regard, Vice President Mike Pence's 2018 speech at the Hudson Institute[5] marked a turning point. Pence accused Xi Jinping of interfering in US domestic politics and laid out the main arguments shared by Democrats and Republicans towards China: Beijing is trying to change the international order in its favour, and with the militarisation of the South China Sea and the high increase in military spending it seeks to push the US out of the Western Pacific and prevent it from coming to the aid of its allies. There is a general fear that China's policy of commercial dominance is a covert strategy to assert itself as a hegemonic power in other areas. In security, there are concerns about the aggressiveness with which Beijing has asserted its claims to disputed territories in India, the South China Sea and the East China Sea. To this diagnosis must be added other recent episodes, such as the "friendship without limits" pact between China and Russia weeks before the invasion of Ukraine, the failure to fulfil commitments made in the reunification of Hong Kong, the intrusion of an alleged Chinese spy balloon in 2023, and the devastating *Salt Typhoon* hack of the US telecommunications system in December last year, which has set off alarm bells about the cyber threat and the digital vulnerability of the United States.

America's Indo-Pacific strategy

These concerns were reflected in successive Indo-Pacific strategies, the national security strategy, NATO's strategic concept, AUKUS, the Quad, as well as in its bilateral and trilateral security agreements with the Indo-Pacific countries.

The 2022 *Indo-Pacific Strategy* recognises that “US interests can only be advanced if we firmly anchor the United States in the Indo-Pacific and strengthen the region itself, together with our closest allies and partners”. The document avoids a confrontational approach with China and recognises the need to collaborate in areas of common benefit, such as climate change and nuclear non-proliferation.

The action plan includes, among others, leading an *Indo-Pacific Economic Framework for Properity (IPEF)*; strengthening deterrence against China's aggression towards the

[5] Pence, M. (2018). *Vice President Mike Pence's Remarks on the Administration's Policy Towards China* [online]. Hudson Institute. [Accessed: 2025]. Available at: https://www.hudson.org/events/1610-vice-president-mike-pence-s-remarks-on-the-administration-s-policy-towards-china102018

US and its allies, including in the Taiwan Strait[6] ; strengthening the Association of Southeast Asian Nations (ASEAN); supporting India's continued rise and regional leadership; operationalising the Quad; and expanding cooperation between the US, Japan and South Korea. The proposal has several very precise tools: the Pacific Deterrence Initiative, the Maritime Security Initiative and the AUKUS alliance. Within this framework, and during the Biden Administration, the following steps have been taken:

- Progress in negotiations on the Indo-Pacific Economic Framework for Prosperity (IPEF) 2022. The IPEF is a project launched by President Biden that could be an alternative to the Trans-Pacific Partnership (TPP) negotiated by Barack Obama and later rejected by Trump. Fourteen countries from the Indo-Pacific region are members along with the US. It aims to foster sustainable and inclusive economic growth and promote resilience of production chains. Critics question the lack of content and concrete measures.
- Announcement of the India-Middle East-Europe Economic Corridor (IMEC) during the G20 summit in Delhi. The MoU was signed by Saudi Arabia, the European Union, India, the United Arab Emirates (UAE), France, Germany, Italy and the United States. The physical and digital infrastructure project will connect the UAE with Israel via Saudi Arabia and Jordan. IMEC emerges as a US counterweight to China's *Belt and Road Initiative* (BRI) and its growing diplomatic influence in the region, and ties in with the US goal of stabilising the Middle East and maintaining the momentum of the Abraham Accords between Israel and Arab countries[7].
- Holding of the special US-ASEAN summit.
- Deepening trilateral cooperation between the United States, Japan and the Republic of Korea with the Trilateral Leaders' Summit at Camp David in August 2023.

[6] On Taiwan, President Biden has stated on several occasions that the US will defend the territorial integrity of the island if Beijing invades, but simultaneously stated that Washington respects what it has agreed with China, i.e. it has maintained its traditional policy towards Taiwan of "strategic ambiguity".

[7] Rizzi, A. (2024). The infinite connection: How to make the India-Middle East-Europe ecnomic corridor happen [online]. *ECFR*. [Accessed: 2025]. Available at: https://ecfr.eu/publication/the-infinite-connection-how-to-make-the-india-middle-east-europe-economic-corridor-happen/

- Launch of the *Quad Investors Network* to foster co-investment in critical technologies, and the *Indo-Pacific Partnership for Maritime Domain Awareness* (IPMDA).
- Launch of the Blue Pacific Partners (2022) initiative with Australia, Japan, New Zealand and the UK to support economic and security priorities among Pacific Island nations.
- Conduct of the first joint US-EU naval exercise off the coast of Oman.
- Strengthening trilateral cooperation with Japan and the Philippines.
- Upgrading of bilateral relations with Vietnam and Indonesia to the level of a comprehensive strategic partnership.
- NATO's Madrid summit in 2022 hosted for the first time the heads of state and government of Australia, Japan, the Republic of Korea and New Zealand. NATO, in its 2022 strategic concept, stated that partners will work together "to address the systematic challenges to Euro-Atlantic security posed by the Chinese Communist Party".
- The Minerals Security Partnership (MSP)[8] , aimed at strengthening critical mineral supply chains to ensure resilient production chains. Although not strictly an Indo-Pacific project, the main US partners in the region are part of it.
- AUKUS (Australia, United Kingdom and United States), the trilateral military cooperation pact formalised in September 2021.

On the economic front, the Biden administration has advanced the policy of tariffs and limiting China's dependence on Trump, a process that oscillates between *de-risking* (minimising risks), *friendshoring* (collaboration with “friendly nations”) and decoupling. However, it is not yet clear what level of decoupling will be sought, nor the principles that articulate the measures.

[8] MSP is an initiative to strengthen critical minerals supply chains and ensure that critical minerals are produced, processed and recycled in accordance with environmental, social and corporate governance standards. The MSP is composed of fourteen countries and the EU: Australia, Canada, Estonia, Finland, France, Germany, India, Italy, Japan, Norway, South Korea, Sweden, the United Kingdom, the United States and the European Union.

In August 2024, the chip bill was passed to improve the semiconductor industry, and the Inflation Reduction Act (IRA) was passed. The *friendshoring* has extended the embargo beyond the US. The Netherlands and Japan signed agreements to restrict the export of semiconductor manufacturing machinery to China. Technology decoupling is widening. In September last year, the House of Representatives passed the Biosafety Act, legislation aimed at strategically decoupling from China in the area of biotechnology. In recent weeks there has been debate over whether to ban certain applications such as Tiktok, and in September last year the Biden Administration proposed a rule banning the sale of Chinese cars in the US and their importation via third party channels such as Mexico or Hungary.

In sum, in recent years, we have witnessed a steady advance in the implementation of US policies towards the Indo-Pacific region, an effort clearly documented in various official publications. Both Democrats and Republicans agree on the importance of countering certain aspects of China's participation in the global economy. However, this strategy is not without significant risks, including the potential for higher prices and their impact on inflation, the complexity of decoupling Chinese technologies from critical sectors of the US economy, and the disruptive effect on a system as interdependent as the globalised economy.

Donald Trump's recent electoral victory marks the beginning of a new phase in a global situation fraught with uncertainty. On the one hand, there is a broad bipartisan consensus that anticipates a policy of continuity and deepening of the Indo-Pacific strategy conceived as an ambitious regional integration effort with projections of global impact[9] . However, Trump represents a break with the ways and diplomacy of the Democrats, which raises serious questions. During his first term, the president implemented a policy of pressuring key allies such as Japan, South Korea and Taiwan by demanding significant increases in their defence budgets. His return could involve similar or even harsher policies. However, as Secretary of State Marco Rubio pointed out in a recent article in *Nikkei Asia*, the US is not in a position to confront Beijing's ambitions on its own and will need to strengthen and

[9] Borreguero, E. (2024). Asia, waiting for Trump 2.0 [online]. *El País*. [Accessed: 2025]. Available at: https://elpais.com/opinion/2024-12-02/asia-a-la-espera-de-trump-20.html

preserve relations with its allies through cooperation to balance the balance of power in the region.

The president's cabinet decisions reflect a clear orientation towards a more confrontational stance towards China. Key figures such as National Security Advisor Mike Waltz, Secretary of State Marco Rubio and Secretary of Defence Pete Hegseth - all of whom are recognised “hawks” on China-related issues and staunch defenders of India - augur a hardening of the rivalry with Beijing in India's favour. Trump, for his part, has repeatedly threatened to use tariffs as a weapon of pressure and negotiation, but given his contradictory and unpredictable nature, it is difficult to anticipate scenarios.

In any case, the success of the US strategy will depend on its ability to navigate the complexities of an interconnected global economy, balance Trump's *America First* protectionism with strengthening coalitions, and manage the risks inherent in an increasingly polarised foreign policy.

China, the Indo-Pacific with Chinese characteristics

For Chinese analysts and leaders[10] the Indo-Pacific concept shifts the strategic value of the Asia-Pacific towards the Indian Ocean, a shift that benefits India as it enjoys a privileged location. They also recognise that given the centrality of the Indian Ocean in shipping routes, India and China will intensify their strategic competition. In general, they see liberal democracies' plans for the "Indo-Pacific" as aimed at strengthening US power and containing China's expansion. This is why the Indo-Pacific vision was rejected by Beijing, whose foreign minister Wang Yi said in 2018 that the idea would eventually disappear "like foam on the sea".

However, Beijing has had its own Indo-Pacific strategy for more than a decade: the Maritime Silk Road for the 21st century, which is part of the Belt and Road Initiative launched by Xi Jinping in 2013 to boost trade and connectivity between Asia, Europe and Africa.

[10] Elliot, S. J. (2024). Chinese Perspectives on the "Indo-Pacific" as a Geostrategic Construct [online]. *National Bureau of Asian Research.* [Accessed: 2025]. Available at: https://strategicspace.nbr.org/chinese-perspectives-on-the-indo-pacific-as-a-geostrategic-construct/

Xi Jinping's Indo-Pacific Strategy

According to the official website[11] , the Maritime Silk Road encompasses a vision of two connected oceans linking "ASEAN, South Asia, West Asia, North Africa and Europe", and a partnership for the South China Sea and the Pacific and Indian Oceans. It consists of three “blue economic corridors”, including the “China-Indian Ocean-Africa-Mediterranean Sea”. As Australian analyst Rory Medcalf[12] puts it, the BRI is the "Indo-Pacific with Chinese characteristics". The project has become one of the pillars of Beijing's international relations alongside Made in China 2025 and the Global China Initiative. Associated with it are institutions such as the Asian Infrastructure Investment Bank.

The Belt and Road Initiative is a strategy designed to address the CCP's priorities and goals. On the trade side, it circumvents the “Malacca dilemma”[13] and protects the sea lanes through which exports transit, and gives control over critical facilities such as ports. Politically, the BRI facilitates the expansion of Chinese influence through the creation of a "community of friends".

Much of the BRI's objectives have been achieved. In the Indo-Pacific region, China has developed deepwater naval power, the world's largest maritime combat force[14] , and has established a military presence in Djibouti, close to bases held by France, the US and Japan. It has also formed a constellation of ports that it controls, in whole or in part, through the acquisition of stakes[15] . Port investments along the Maritime Silk Road give China an anchorage at points of great geostrategic value, such as the port of Hambantota in Sri Lanka, just 400 kilometres from India; Gwadar in Pakistan, close to the Strait of Hormuz; and the aforementioned naval base in Djibouti, located at the entry point of the Suez Canal. Other key port facilities include installations in Myanmar, Cambodia, Brunei, Thailand and Tanzania.

[11] See: Belt and Road Portal, available at: https://eng.yidaiyilu.gov.cn/project.
[12] Medcalf, R. (2019). The Indo-Pacific with Chinese characteristics [online]. *Politique Étrangère*, 3, pp. 49-61. Available at: https://shs.cairn.info/journal-politique-etrangere-2019-3-page-49?lang=en
[13] Over-reliance on the Strait of Malacca for the transit of oil and gas imports and, in general, for the movement of goods to Europe and Africa.
[14] Palmer, A., Carroll, H. and Velázquez, N. (2024). *Unpacking China's Naval Buildup* [online]. Center for Strategic & International Studies. [Accessed: 2025]. Available at: https://www.csis.org/analysis/unpacking-chinas-naval-buildup
[15] Zongyuan Z. (2024). *Tracking China's Control of Overseas Ports* [online]. Council on Foreign Relations. [accessed: 2025]. Available at: https://www.cfr.org/tracker/china-overseas-ports

However, the proximity of these sites to the borders of countries such as India raises concerns. There are fears that they could be dual-use, i.e. used for both commercial and military purposes in a given scenario.

The Belt and Road Initiative exemplifies the distinguishing element of the Chinese Communist Party's (CCP) power-building strategy: commercial diplomacy. The hegemonic presence of the US as the military power signatory to the largest number of defence treaties limited Beijing's ability to compete with Washington in this field. As political scientist Oriana Skylar Mastro argues, the US "got all the good allies".[16] (China has only signed a mutual defence agreement with North Korea). The CCP therefore looked for unexplored alternatives and found a space of opportunity in economic agreements and comprehensive strategic partnerships. The Belt and Road Initiative has channelled the CCP's aims and enhanced Beijing's economic security. Today, China is the world's largest export economy, the world's largest global creditor and the largest trading partner of more than 120 countries. It dominates maritime trade in terms of volume, shipbuilding activity and port creation and ownership worldwide.[17] . Over the past decade, China has become a major partner and provider of assistance and loans to Pacific Island nations, most notably the Solomon Islands, with which it signed a security pact in 2022, much to the concern of the US and Australia.

[16] Rachman, G. (2024). China's great power strategy [online]. *Financial Times.* [Accessed: 2025]. Available at: https://www.ft.com/content/bcc32b19-2eac-434a-af2c-82f58903eead?utm_source=chatgpt.com

[17] Runde, F. D., Hardman, A. and Bonin, C. (2024). Responding to China's Growing Influence in Ports of the Global South [online]. *Center for Strategic & International Studies*. [Accessed: 2025]. Available at: https://www.csis.org/analysis/responding-chinas-growing-influence-ports-global-south

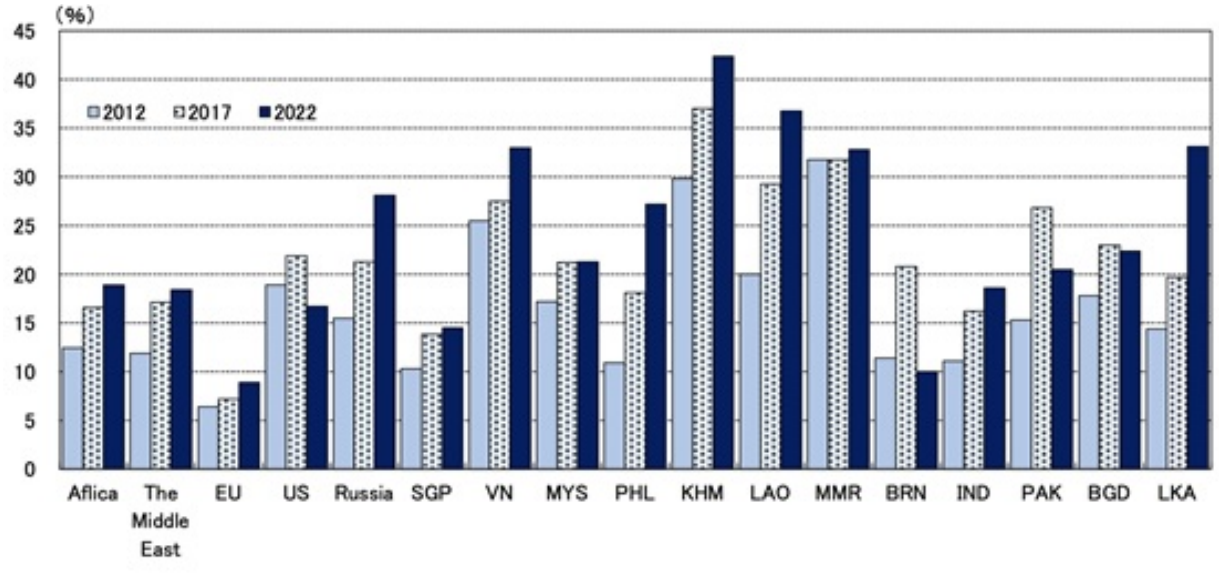


Figure 1. Evolution of China's share of its total imports. *Source*: Japan Center for Economic Research

The expansion of the BRI has gone beyond the initial official boundaries to Latin America and the Caribbean, where twenty-two countries have signed up to China's Belt and Road Initiative. Although the BRI's reach has been slowed by the pandemic and the slowdown in China's economy, the opening last December of the Chancay mega-port in Peru shows the project's continuity. In the light of Xi Jinping's speech to the third BRI forum, analysed by the Merics *think tank,* it can be deduced that in the future the initiative will be oriented towards green energy and telecommunications equipment[18] , and will expand into the countries of the so-called global south, free from the restrictions imposed by the markets of the US and its allies.

The BRI responds to Xi's vision of “China's dream of national rejuvenation” (2013), a narrative that places special emphasis on the advancement of science, technology and innovation, with the digital Silk Road as the technological dimension. For the technonationalism embodied in Xi's vision, innovation is a priority to ensure national security and global economic and political leadership[19]. According to the conclusions of expert Tai Ming Cheung, the development of critical technologies has a particular impact

[18] Banach, C. and Gunter, J. (2023). How the BRI is shaping global trade and what to expect from the initiative in its second decade [online]. *MERICS.* [Accessed: 2025]. Available at: https://merics.org/en/tracker/how-bri-shaping-global-trade-and-what-expect-initiative-its-second-decade

[19] Atkinson, R. D. (2024). China Is Rapidly Becoming a Leading Innovator in Advanced Industries [online]. *ITIF.* [Accessed: 2025]. Available at: https://itif.org/publications/2024/09/16/china-is-rapidly-becoming-a-leading-innovator-in-advanced-industries/

on the region that concerns us[20] . In his book *Innovate to Dominate,* the author stresses that China's technological security state is pursuing a comprehensive merger of civil and national security. China is currently making progress in the transition to an indigenous innovation model to turn the country into a self-sufficient innovation power that leads the world, a goal it will achieve throughout the 2020s and early 2030s according to official plans - in particular, the Science, Technology and Innovation (STI) 2030 programme and the Medium- and Long-Term Science and Technology Development Plan 2021-2035. Finally, it signals a shift from a defensive realist approach focused on economic development and with a low international profile to an offensive one that maximises zero-sum security in the Asia-Pacific region and in new technological domains, such as cyber and outer space. This is in line with the sharp increase in military investment and national security strategy.

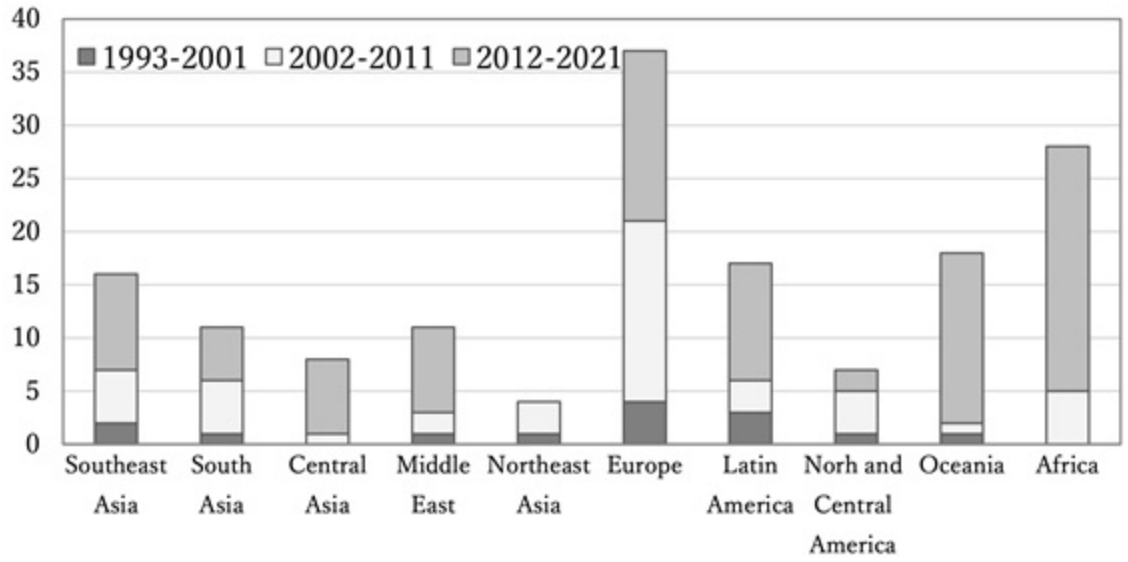


Figure 2. Evolution of the number of completed and upgraded partnerships in China. *Source*: Japan Center for Economic Research

The CCP's strategy of turning the country into a global economic power serves the principle of preserving social stability, a priority objective of the white paper *China's National Defence in the New Era*[21] . This stability depends on sustained economic growth,

[20] Cheung, T. M. (2022). *Innovate to Dominate: The Rise of the Chinese Techno-Security State*. Cornell University Press.
[21] See: https://english.www.gov.cn/archive/whitepaper/201907/24/content_WS5d3941ddc6d08408f502283d.html

which in turn provides the CCP with the legitimacy base necessary to govern without domestic shocks. The slowdown in China's economy over the past two years, along with other factors such as demographic decline, creates a scenario of risk and uncertainty.

In 2024, despite the economic downturn, the defence budget increased to 1665 billion yuan ($236 billion), a nominal increase of more than 7% in the 30th consecutive year of increases. Although as a proportion of GDP (1.27%) the Chinese budget is lower than the world average of 1.8% and NATO's traditional target of 2%, the figure is significantly higher than the rest of the individual Asian countries, which together spent an estimated $298 billion[22].

Along with social stability, the white paper emphasises the preservation of China's national sovereignty, territorial integrity and maritime and international rights as pillars of national security. The paper singles out the US as responsible for intensifying competition between the major powers. While acknowledging the existence of maritime and territorial disputes, it avoids specifics, stating only that "the South China Sea islands and the Diaoyu Islands are inalienable parts of China's territory". It also reaffirms China's right to exercise sovereignty over these areas by building infrastructure and deploying defensive capabilities in both the South and East Seas. In relation to Taiwan, it maintains that peaceful reunification is sought, although it makes clear that it "does not renounce the use of force" and reserves the option to take "all necessary measures".

In 2025, it will be worth paying attention to these aspects, especially as Beijing has sought to legitimise its maritime sovereignty claims through an expansive policy in recent years. In 2023 and 2024, there has been a marked increase in People's Liberation Army (PLA) hostility in the waters of the "first island chain"[23] , the group of islands off the coast of East Asia that stretches from the Japanese archipelago through Taiwan and the Philippine islands to the Malay Archipelago, and which China considers its first line of defence.

In Taiwan, PLA air and naval forces have increased the frequency and intensity of military operations around the island, justified in response to what it sees as provocations by Taiwan and the US. In 2024, within days of the election of President Lai Ching-te, whom

[22] McGerty, F. (2024). Asian defence spending grows, China's grows more [online]. *IISS*. [Accessed: 2025]. Available at: https://www.iiss.org/online-analysis/military-balance/2024/05/asian-defence-spending-grows-chinas-grows-more/
[23] Sharp, A. (2024). China's 3-pronged maritime threat rattles Japan, Philippines and Taiwan [online]. *Nikkei Asia*. [Accessed: 2025]. Available at: https://asia.nikkei.com/Spotlight/Asia-Insight/China-s-3-pronged-maritime-threat-rattles-Japan-Philippines-and-Taiwan

Beijing describes as a “dangerous separatist”, the Chinese military conducted “Joint Sword 2024A” mock war exercises as punishment. The exercise, says Australian *think tank* The Jamestown Foundation[24] , took place in nine locations and marks a significant escalation by including offshore islands for the first time. It also demonstrates the PRC's continued use of "grey zone" tactics, coercive actions that remain below the threshold of armed conflict but allow for escalation and de-escalation of military operations without triggering full-scale conflict. The second part of the "joint sword 2024B" war exercises took place in October. Taiwan, for its part, has increased its defence budget and raised its military capabilities.

Tensions between China and the Philippines in the South China Sea have hardened with increasingly violent clashes in the Second Thomas Shoal, the shoal that lies in the Philippines' exclusive economic zone (EEZ) and over which China, as ruled by the Permanent Court of Arbitration in The Hague, has no rights. Last year, the Philippines adopted a new strategy of publicising the clashes by broadcasting videos of Chinese Coast Guard assaults and inviting international journalists aboard its ships. Philippine Defence Secretary Gilbert Teodoro said China has become an "existential threat" in the South China Sea.

The election of Ferdinand Marcos Jr. as president in 2022 marked a turning point in Sino-Philippine relations. Marcos Jr. distanced himself from his predecessor Rodrigo Duterte's moves towards a friendly rapprochement with Beijing and has strengthened relations with the US and its allies to develop a joint regional security architecture. In 2023, the Philippine government announced that it was extending the *Enhanced Defence Cooperation Agreement* (EDCA) that provides the US access to Philippine military facilities to four new bases. It also signed a classified military intelligence sharing agreement, the *General Security of Military Information Agreement* (GSOMIA). Other measures of defence collaboration have included the Philippines' participation in mini-lateral summits and exercises, such as the first Japan-Philippines-US summit in 2024 and the first Japan-Philippines-US summit in 2024. The first Australia-Japan-Philippines-Philippines-Republic of Korea-US defence ministers' meeting in November.

[24] Yu, C. C. (2024). Joint Sword-2024A: Blockades and Gray Zone Tactics [online]. *China brief volume*, 24(15). [Accessed: 2025]. Available from: https://jamestown.org/program/joint-sword-2024a-blockades-and-gray-zone-tactics/

For its part, China introduced new regulations in June that give its Coast Guard broad authority to use force against foreign actors for "trespassing" in South China Sea territories it claims, including the EEZs of other countries, including the Philippines[25].

To summarise, a dynamic cycle of mutually feeding forces has developed in recent years: on the one hand, Washington has tightened alliances with its Asian partners and, on the other, Beijing has flexed its muscles and sought to unilaterally change the *status quo* in disputed territories and waters, prompting affected countries such as India, Australia, Japan, the Philippines and South Korea (including Taiwan) to increase their defence budgets, forge new coalitions and forge closer relations with the US. This dynamic will continue through 2025.

Another aspect to be taken into account will be the influence of the Chinese economy on Beijing's external movements. For analyst Medcalf, China's assertiveness is explained more as a weakness than as proof of its strength. Beijing, on the brink of a perfect storm of domestic difficulties (slowing economy, frustrated population aspirations, inequality, environmental problems, ageing population), is trying to secure a series of global gains while it can. Other hypotheses raise the possibility that, in the face of domestic turbulence, the CCP may be reinforcing nationalist and confrontational positions towards other countries or Taiwan, or that, on the contrary, it may be avoiding diverting resources and attention to external conflicts that would lead to unnecessary attrition in order to deal with the domestic crisis. In any case, given the build-up of tensions and the intensification of military activity in the "first island chain", there is a real risk that the situation could accidentally escalate, with the possibility of involving the United States and other powers.

India, between dependence and autonomy

India enjoys a privileged geostrategic position in the Indo-Pacific, that of a continental wedge embedded in the Indian Ocean from where it connects with the Arabian Sea to the west and the Bay of Bengal and the Andaman Sea to the east. Moreover, the Indian islands of Andaman, Nicobar and Lachedives provide a power projection that extends beyond the subcontinent. Today, 95% of India's international trade by volume and more than 70% by value flows through these waters. However, the Indian Ocean's ascendancy

[25] Legarda, H. *et al.* (2024). China Security and Risk Tracker [online]. *MERICS*. [Accessed: 2025]. Available at: https://merics.org/en/tracker/merics-china-security-and-risk-tracker-022024

over India is not a new phenomenon, as the Indian historian and diplomat K. M. Panikkar, who wrote about the Indian Ocean's rise, recalls. M. Panikkar, who wrote: "a true appreciation of India's historical forces will show beyond doubt that whoever controls the Indian Ocean has India at his mercy[26]", which would indicate India's renewed interest in its maritime environment.

Consequently, the Indo-Pacific acquired a new relevance in Indian geopolitics after Prime Minister Narendra Modi took office in 2014.

Narendra Modi's Indo-Pacific Strategy

Narendra Modi's government's priorities for India can be summed up along three lines: positioning the country as a global power in line with its economic and demographic weight, responding to the rise of China, and preserving strategic autonomy. Officially, India has no allies - the government has never used the term - which allows it to pursue a multilateral foreign policy, as well as maintain good relations with countries that are antagonistic to each other, such as Israel and Iran or Russia and the United States. This has not prevented it from a praxis of agreements aimed at a policy of rapprochement with partner countries and institutions, including the Association of Southeast Asian Nations (ASEAN) and the US through the Joint Strategic Vision for the Asia-Pacific and Indian Ocean (2015), the Quadrilateral Security Dialogue (Quad) and the Civil Nuclear Cooperation Agreement (2008).

Along these three axes, the Indo-Pacific plays a decisive role that is projected in Indian foreign policy and, as foreign minister S. Jaishankar points out, deploys a strategy in concentric circles from national maritime infrastructure to the maritime space beyond India's waters and its immediate island neighbourhood[27] . In line with these objectives, in 2015 the Navy developed an Indian maritime strategy and undertook an expansion of “areas of maritime interest” to the entire western and south-western Pacific Ocean[28] . In 2019, the Ministry of External Affairs created a new Indo-Pacific division, and the defence budget allocation for the Navy has increased from 14 per cent in 2021-2022 to 20 per

[26] Purushothaman, U. (2024). India's interests and strategies in the Indo-Pacific. In: C, A. J., & Lobo, J. S. (Eds.) (2024). *The new world politics of the Indo-Pacific: Perceptions, policies and interests*. Taylor & Francis Group.
[27] Jaishankar, S. (2022). *The India Way*. Harpers Collins, p. 186.
[28] *Ibid.*

cent in 2023-2024[29] . An incremental effort for a country that, as Uday Bashkar, director of the Society for Policy Studies, says[30] , is second only to China in the region and is projected to be a maritime power, a goal that is still aspirational.

Along with the aforementioned oceanic objectives, the Indo-Pacific represents an arena of competition with a rising China that Delhi sees as a regional hegemon. The suspicion of Beijing has only increased with its presence in close proximity to India through the Belt and Road Initiative, which includes the China-Pakistan economic corridor and military and commercial facilities in the ports of Gwadar in Pakistan, Hambantota in Sri Lanka and Chittagong in Bangladesh. The so-called "String of Pearls" that encircles India.

India's Indo-Pacific strategies have been reinforced in recent years through India's participation in the Quad[31] , the conduct of joint maritime exercises and the *Act East Policy*, the policy of connectivity between India's northeast and Southeast Asian regions.

The Quad forum provides a matrix of bilateral and mini-lateral relations. In a state of hibernation since its inception in 2007, it held its first heads of state summit in 2021, at the end of the COVID-19 pandemic. India and the US moved closer together to include real-time intelligence sharing and build military capabilities in the Indo-Pacific. In 2022, they launched the Critical and Emerging Technologies Initiative, aimed at fostering cooperation in the defence industry, manufacturing jet engines in India and creating alternative semiconductor supply chains to China.

New Delhi has advanced its maritime geopolitical objectives through naval diplomacy with the Indian Navy's visits to the Indo-Pacific region increasing in number and scope, a tool it uses both to cement maritime partnerships and to indirectly send deterrent messages to Beijing. If between 2011 and 2021 the Indian Navy visited 72 foreign countries, between 2023 and 2024 it visited more than 50 foreign ports[32] . In 2023 it participated in a joint exercise with seven ASEAN navies in the South China Sea, followed by a joint statement with the Philippines calling on China to respect international law in its territorial claims.

[29] According to the European Parliamentary Research Service.
[30] Baskhar, U. (2025). Atmanirbhar at sea [online]. *The Indian Express.* [Accessed: 2025]. Available from: https://indianexpress.com/article/opinion/columns/atmanirbhar-at-sea-9783372/
[31] Saran, S. and Pant, H. V. (2024). *Two Decades of the Quad: Diplomacy and Cooperation in the Indo-Pacific* [online]. ORF. [Accessed: 2025]. Available at: https://www.orfonline.org/research/two-decades-of-the-quad-diplomacy-and-cooperation-in-the-indo-pacific
[32] Deshpande, S. (2024). Increased deployment, joint exercises, foreign training & faster aid - Indian Navy's growing footprint [online]. *The Print*. [Accessed: 2025]. Available at: https://theprint.in/defence/indian-navys-growing-footprint-foreign-deployment-training-allied-personnel-backyard-aid/2154505/

Apart from this, India has conducted its first naval exercise with the European Union in 2023 in the Gulf of Guinea, with ships from Italy, France and Spain. These operations are of minor significance but nevertheless have a symbolic value that should not be underestimated. The same is true of the *Maritime Partnership Exercise (*MPX) conducted in September 2023 between the Indian Navy ship (INS) Sumedha and the Spanish Navy ship (ESPS) Meteoro, and the Indian Navy frigate INS Tabar with the Spanish Navy patrol vessel Atalaya, both in the Mediterranean Sea.

Rivalry with China

Disagreements between India and China are an issue that is often left out of the media spotlight. Even the CCP's public stance tends to downplay the importance of the neighbouring country, with an attitude of disdain. This is not surprising, as it is a well-known fact that the CCP cannot afford to ignore the relevance of India, the only country in the region that can counterbalance its power and challenge its hegemony, especially considering that, as R. Kaplan, "while China seeks to expand its influence vertically, that is, reaching southward to the warm waters of the Indian Ocean, India seeks to expand its influence horizontally, reaching eastward and westward to the borders of Victorian-era British India, parallel to the Indian Ocean"; that is, their respective ambitions intersect and are destined to meet head on. India, for its part, recognises the uniqueness of the problem with the neighbouring power, as reflected in the latest words of Indian Foreign Minister Jaishankar: "India has a *special problem with China* that goes beyond and above the *general China problem of* the world"[33] . At present, the Indian Army is the only one that engages in hand-to-hand combat with Chinese soldiers, resulting in casualties of wounded and killed.

[33] Express News Service (2024). India has a special China problem above world's general China problem: Jaishankar [online]. *The Indian Express*. [Accessed: 2025]. Available at: https://indianexpress.com/article/india/state-ties-china-calls-investments-from-scrutinised-jaishankar-9543086/

Territorial disputes

India, like the US and the EU, maintains a dual bond with Beijing for national security and economic growth needs that are compartmentalised, though increasingly less so.

Since China and India fought a one-sided war in the Karakoram range in 1962 that cost India vast tracts of land, disputes over the border have continued. Although the two countries have never agreed on a formal demarcation, they know the boundaries patrolled by their armies. Other disputes include China's claim to the 90,000 $km^2$of India's northeasternmost state, Arunachal Pradesh, which Beijing calls "Southern Tibet", as well as the dispute over the Doklam Plateau in Bhutan. On the other hand, China enjoys a significant strategic advantage over India in dominating the geopolitics of water, as the main rivers that supply northern India, the Brahamaputra and the Indus, originate in the glaciers of Tibet. This control over water resources gives Beijing considerable power over its neighbours, as evidenced by the concern in New Delhi over Beijing's decision to build the world's largest hydroelectric dam on the Tibetan course of the Brahamaputra River.

In recent years, the border clashes between the two armies have been activated in three phases.

- In 2017, Chinese army engineers entered the Doklam plateau to build a road. After coordinating with the Bhutanese authorities, the Indian soldiers on the other side of the border intervened and stopped the Chinese manoeuvres in their tracks. This territory is of vital importance to India, as it lies in close proximity to the narrow Siliguri corridor, known as the “Chicken's Neck”, a link connecting India's seven north-eastern states to the subcontinent.
- In May 2020, at the height of the COVID-19 pandemic, thousands of Chinese People's Liberation Army border guards crossed the Line of Actual Control (LAC), which separates the two countries along the Karakorum Range stretch of the border, and pushed into multiple areas on the Indian side in the Ladakh region, capturing territory along five separate points. When its armed forces attempted to check the PLA advance, an unusually violent clash ensued, resulting in the deaths of twenty Indian soldiers and an unknown number of Chinese, the first combat deaths on the Sino-

Indian border since 1975[34] . In 2024, Beijing and New Delhi have engaged in a diplomatic dialogue to address the issue, but until India returns to the *status quo* as it was before April 2020 - difficult to foresee so far - there will be no return to normality. India's foreign minister, Jaishankar, emphasised this in a statement: "the state of the borders will determine the state of relations".

– In December 2022, hundreds of Chinese PLA soldiers, armed with spiked bats and other pre-modern weapons[35] , attempted to dislodge an Indian Army post in the state of Arunachal Pradesh, resulting in a fierce clash that left 34 Indian soldiers injured.

In these cases, the PLA resorts to the tactic of "grey zones" and what is known as "*salami slicing"*, a policy of advancing the occupation of territory by taking small steps that change the facts on the ground gradually and which it successfully applies in other territories such as the South China Sea, the East China Sea, in the Senkaku/Diaoyu Islands area and in Taiwan[36].

There is an additional apprehension: the modernisation of China's nuclear arsenal with the largest deployment in quantity and diversity of nuclear weapons to date, in line with the defence white paper's goal of enhancing the People's Liberation Army's competence in all domains of warfare - land, air, sea, space, counter-space, electronic, cyberspace and nuclear[37] -.

The Stockholm International Peace Research Institute (SIPRI) reported that in January 2024 China had an estimated arsenal of some 500 nuclear warheads[38] , a number that the Pentagon is updating to 600 by December 2024. This figure, which SIPRI predicts will increase over the next ten years, is three times the number possessed by India - 174 warheads - which is almost on a par with Pakistan, with 170 warheads. Some projections also suggest that China could potentially deploy at least as many intercontinental ballistic

[34] Shukla, A. (2024). Disengagement at the border [online]. *Business Standard*. [Accessed: 2025]. Available at: https://www.business-standard.com/opinion/columns/india-china-signal-progress-on-ladakh-dispute-but-key-questions-remain-124103101144_1.html

[35] Agreements between India and China to patrol the Line of Actual Control do not allow soldiers to carry firearms in order to prevent an escalation of violence.

[36] Krishnan, A. (2024). Shivshankar Menon and Ashok Kantha on the Border Agreement and the Future of the India-China Relationship [online]. *The India China Newsletter*. [Accessed: 2025]. Available at: https://indiachina.substack.com/p/shivshankar-menon-and-ashok-kantha

[37] Padhan, S. D. (2024). Growing nuclear arsenal of People's Republic of China: Implications for India [online]. *The Times of India*. [Accessed: 2025]. Available at: https://timesofindia.indiatimes.com/blogs/ChanakyaCode/growing-nuclear-arsenal-of-peoples-republic-of-china-implications-for-india/

[38] Kristensen, H. M. and Korda, M. (2024). World nuclear forces. In: SIPRI Yearbook (2024). [Accessed: 2025]. Available at: https://www.sipri.org/sites/default/files/YB24%2007%20WNF.pdf

missiles as Russia or the United States in that period, although the total stockpile of warheads is still smaller than that of either of those states.

India's nuclear strategy has traditionally dealt with Pakistan, although it was China that pushed India to develop its own nuclear arsenal after the 1962 defeat and Beijing's detonation of its first atomic bomb in 1964. Similarly, "it was China, and not Pakistan's military alliance with the United States, as is often believed, that brought the Cold War to India's doorstep"[39] , notes analyst Tanvi Madan. China and India subscribe to the principle of *no first use* (NFU) while Pakistan maintains a policy of "first use, but as a last resort".

In Delhi, notes the Observatory Research Foundation *think tank*[40] , there is concern that China is preparing a more aggressive rearmament to compete with the US. China's defence documents in recent years omit any reference to the NFU, and its nuclear modernisation is taking place not in limbo, but in circumstances that include North Korean proliferation, the war in Ukraine, Beijing's refusal to allow India to join the Nuclear Suppliers Group, and increased cross-border tensions. What is the goal of this increase in nuclear capability - the annexation of Taiwan? To shape an international order in line with its national objectives involving South China Sea and Indian Ocean countries?

The conundrum leads Indian analysts to propose a revision of its nuclear doctrine, the denial of the NFU to enemy nations or even the formation of an AUKUS-like arrangement. This is the proposal of Ashley Tellis, author of *Striking Asymmetries. South Asia's new nuke symmetry.* For Tellis, China's nuclear superiority over India is so pronounced that India should sign a pact with the United States and France similar to AUKUS: INFRUS.

Rapprochement with democracies in Asia and the West

In the wake of the confrontations with China, India decided to play a more active role and seek closer ties with the US and other democratic regimes in the West and Asia. Prominent among these is the relationship with Japan, India's most important partner in

[39] Madan, T. (2020). *Fateful Triangle. How China Shaped US-India relations during the Cold War.* Penguin Books.
[40] Mohan, P. (2023). China's Nuclear Ambitions, the Implications for India, and the Future of Global Disarmament [online]. *ORF*. [Accessed: 2025]. Available at: https://www.orfonline.org/research/china-s-nuclear-ambitions-the-implications-for-india-and-the-future-of-global-disarmament

Asia. India has also strengthened its participation in the Quad and the Indian Ocean Rim Association (IORA).

In his third term, Modi is taking a tougher stance on Beijing, moving closer to areas the CCP considers its own. In 2024 he asked Taiwanese President Lai Ching-te to collaborate on joint semiconductor manufacturing. That year, India delivered BrahMos cruise missiles to the Philippines. India is also developing defence ties with Spain through the acquisition of 56 aircraft and an agreement between Airbus and Tata Advanced Systems that provides for the manufacture of sixteen aircraft in Spain, with the remainder in India. With this move, inaugurates its first military aircraft factory run by a private sector company, which, in the long term, will also reduce its dependence on imports from Russia.

Economic security

Economic relations with China are conditioned by two major factors: India is the largest recipient of grants from the Beijing-based Asian Infrastructure Investment Bank, and the trade balance between the two countries has shifted towards a growing asymmetry in favour of Beijing, with a trade deficit of more than $85 billion[41] . Moreover, most of the goods imported from China are capital goods and raw materials that Indian industry uses to manufacture finished goods for export. This dependence impacts on two key sectors of the Indian economy, the pharmaceutical industry and the electronics and telecommunications sector, which are key to the transformation towards a digital society. Aware of the vulnerability of Chinese investments, the Indian government took measures to curb them after the pandemic. However, after the 2024 elections, the number of influential voices, including the Ministry of Finance, calling for opening the doors to Chinese investment increased.

In sum, in its interaction with China, India is caught in a dilemma of choosing between the imperative of ensuring economic growth and the imperative of addressing threats to its territorial sovereignty. In 2025, the government will have to ponder whether it can balance these conflicting trends, whether it will go for *derisking* or move in the direction of *decoupling*.

[41] T. P. (2024). India has highest trade deficit with China, but gap narrowing: Goyal [online]. *The Economic Times.* [Accessed: 2025]. Available at: https://economictimes.indiatimes.com/news/economy/foreign-trade/india-has-highest-trade-deficit-with-china-but-gap-narrowing-goyal/articleshow/112041552.cms

There is one major factor to consider in this dilemma. As has been seen, the Indian economy is benefiting on a large scale from the US strategy of diversifying away from China. Since the pandemic, India has seen an increasing surge in foreign direct investment. If it expands the scope of the bilateral relationship with China, analysts Harsh Pant and Kalpit Mankikar[42] argue, it could undermine the idea of India as a bulwark against Beijing's expansionism and jeopardise proposals that include India in the reconstruction of alternative supply chains.

At the same time, given that tensions along the Sino-Indian border have increased and that the two countries are developing infrastructure along strategically valuable stretches of the border in order to support better troop deployment, this dynamic is likely to continue.

Japan, moving forward along Abe's path

Until the 1990s, Japan's foreign policy was characterised by low-profile diplomacy and a heavy reliance on the US security umbrella. This approach changed with the rise of China following its accession to the World Trade Organisation in 2001. At the time, Japan was in a period of economic stagnation and the effects of China's economic growth on its regional influence were beginning to be felt.

A central figure in Japan's new strategic vision was Shinzo Abe[43] .The prime minister adopted an approach to international relations that he defined as "proactive diplomacy", focused on upholding democratic values and the rule of law. The "proactive" character contrasted with the previous "passive pacifism" that seemed to prove ineffective vis-à-vis Beijing. Its strategy included strengthening Japan's defence capabilities in response to China's growing defence capabilities and deepening alliances with countries that shared values and strategic goals, such as the US and India[44] . This vision was embodied in the Quad and the new Indo-Pacific concept promoted by Abe. Similarly, he reinterpreted Article 9 of the Japanese Constitution by broadening the definition of self-defence to

[42] Pant, H. V. and Mankikar, K. A. (2024**).** The Fatal Flaw in India's China Strategy: Economic Dependence Will Make New Delhi Forever Vulnerable to Beijing [online]. *Foreign Affairs* [Accessed: 2025]. Available at: https://www.foreignaffairs.com/india/fatal-flaw-indias-china-strategy

[43] Kiglics, B. (2021). Japan's Asia-Pacific Diplomacy in the Twenty-First Century: Empty Rhetoric or a New Paradigm? In: Patman, R. G., Köllner, P. and Kiglics, B. (eds.) (2021). *From Asia-Pacific to Indo-Pacific: Diplomacy in a Contested Region*. Springer Singapore.

[44] Japan is under the US security umbrella because the "U.S.-Japan Mutual Security Treaty signed in 1951 ensures U.S. protection to Japan in the event of an attack, enabling Japan to concentrate on its economic growth while depending on U.S. military support".

include collective defence, which allows Japan to collaborate militarily with other countries outside its territory. In this framework, Japan has strengthened relations with India, Australia and South Korea, with agreements such as the Japan-India Strategic and Global Partnership and the Memorandum of Defence Cooperation with Australia, as well as trilateral alliances with the US.

Strategies and key documents with Kishida

After Abe's assassination in 2022, the Fumio Kishida government approved the National Security Strategy (NSS), the National Defence Strategy (NDS) and the Defence Strengthening Programme. These documents emphasise the alliance with the US as the linchpin of national defence and regional stability. They also reflect a more realistic approach in considering the possibility of Japan facing direct military aggression[45].

The texts recognise Russia's invasion of Ukraine as a violation of international norms and warn of possible similar acts in East Asia. They also criticise China's activities in the South China Sea, its strategic alliance with Russia and incursions into the Senkaku Islands.

In this regard, 2024 was marked by a series of unprecedented incidents in Japan's air and maritime spaces[46] . In August, a Chinese Y-9 military intelligence aircraft penetrated Japan's air defence identification zone. In September, the Chinese aircraft carrier Liaoning, accompanied by two destroyers, appeared off Okinawa and entered the area adjacent to Japan's territorial waters. In November, 27 Russian and Chinese military aircraft made joint flights near Japan, and, in December, a Russian submarine was detected sailing between the Yonaguni and Iriomote islands.

Economic relations and disputes with China

Japan's relationship with China is characterised by a dual bond of economic interdependence and strategic rivalry that has intensified in recent years. While their respective economies are integrated through trade and investment - China is Japan's

[45] Tsuneo, W. (2023). What's New in Japan's Three Strategic Documents [online]. *Center for Strategic & International Studies*. [Accessed: 2025]. Available at: https://www.csis.org/analysis/whats-new-japans-three-strategic-documents
[46] Nikkei (2024). Infographic: How Chinese and Russians intrude into Japan's territory [online]. *Nikkei*. [Accessed: 2025]. Available at: https://asia.nikkei.com/Politics/Defense/Infographic-How-Chinese-and-Russians-intrude-into-Japan-s-territory

largest trading partner, with Chinese direct investment reaching more than ¥1 trillion in 2022, an increase of 4.4% over 2021[47] - they also compete for sovereignty over the Senkaku/Diaoyu Islands. In addition, China has unilaterally developed the Shirakaba gas field in disputed areas and established an air defence identification zone (ADIZ) that covers the disputed islands and overlaps with Japan's ADIZ in the region[48].

Japan's strategic actions

In 2024, Japan has strengthened its security through the following initiatives:

- Strengthening the alliance with the US, including rapprochement with South Korea.
- Alignment with US technology restrictions through limits on the export of 22 types of semiconductor production equipment.
- High-level bilateral meetings, such as the US-Japan Security Consultative Committee (2+2) in January 2023[49].

These measures consolidate Japan's position as a key strategic actor in Asia in response to growing geopolitical pressure from China and Russia.

The two Koreas

Since the failure of Washington's diplomatic attempt in 2019 to eliminate North Korea's nuclear programme, relations between the two Koreas have entered a dizzying downward spiral. Cooperation agreements have ground to a halt as Pyongyang attempts to re-establish a dynamic of force that is met by Seoul with defensive measures.

In 2022, the Democratic People's Republic of Korea (DPRK) adopted a nuclear offensive doctrine that included the threat to use nuclear weapons pre-emptively if the regime's survival is threatened. While it is questionable whether Pyongyang will follow through on its warnings given the military asymmetry with the US, these and subsequent statements have raised tensions to alarming levels. In January 2024, Kim Jong-un abandoned the

[47] Divya, A. (2024). China-Japan Relations at a Crossroads Amid Strategic Challenges [online]. *The Diplomat*. [Accessed: 2025]. Available at: https://thediplomat.com/2024/08/china-japan-relations-at-a-crossroads-amid-strategic-challenges/

[48] Kiglics, B. *Op. cit.*

[49] See: https://www.defense.gov/News/Releases/Release/Article/3265559/joint-statement-of-the-2023-usjapan-security-consultative-committee-22/

official goal of reunification and proposed declaring South Korea a "main enemy" of the DPRK, opening up the possibility of "incorporating" the Republic Of Korea by force. In October of the same year, Kim announced that he might use nuclear weapons against South Korea and the US, which he accused of escalating tensions with their military cooperation. That month, Pyongyang inaugurated a plant to produce weapons-grade uranium.

In parallel, DPRK-Russia cooperation has been upgraded to a “comprehensive strategic partnership” under the agreement signed in June 2024, raising concerns about a potential transfer of Russian nuclear technology in exchange for North Korean weapons. Thousands of North Korean soldiers joined Russia in the war in Ukraine, cementing the military partnership. Beijing, annoyed by the rapprochement, organised a trilateral summit in May 2024 with South Korea and Japan. However, given North Korea's close dependence on Beijing, analysts such as Lee Hee-ok and Sungmin Cho argue that Pyongyang's bullying would be a way to get China's attention in order to secure its support. This option is not without risk. If cornered, the North Korean regime could generate an external crisis by attacking South Korea, forcing China to intervene.

South Korea

South Korea's military strategy has evolved in recent years towards a more offensive posture. The 2022 defence white paper defines North Korea as an enemy and justifies this shift by the need to maximise deterrence capabilities in the face of Pyongyang's escalating nuclear provocations. This strategy includes pre-emptive strike capabilities and immediate retaliation.

In 2023, the new defence minister, Shin Won-sik, summed up this stance with the acronym "PISU" (*Punish Immediately, Strongly, and Until the end*). In addition, Seoul has strengthened its alliances with countries that share democratic values and reject authoritarian policies, such as the US, Japan, Australia and India. This is why President Yoon Suk-Yol's failed self-coup was so extraordinary, and why it can be seen as a rising trend in democracies of the risk of the rise of personalism in leadership[50].

[50] Borreguero, E. (2024). South Korea, a failed self-coup [online]. *El País*. [Accessed: 2025]. Available at: https://elpais.com/opinion/2024-12-07/corea-del-sur-un-autogolpe-fallido.html

Japan-South Korea rapprochement

Trilateral collaborations and recent developments:

- Economic and technological security. Seoul, Tokyo and Washington signed the *Trilateral Economic Security Partnership* in 2024, focusing on semiconductor supply chains, clean energy and cybersecurity. They also collaborate on advanced technology, artificial intelligence and critical minerals to diversify their dependence on China.
- Military security. In July 2024, the three countries signed the *Memorandum of Cooperation of the Trilateral Security Cooperation Framework* (TSCF) institutionalising their defence commitment. They have also worked on radar clustering to share real-time data on North Korea's missile activities.
- Institutional relations. Since 2024, security, economic and technology dialogues have been held, such as the third trilateral economic security dialogue in Busan, South Korea. These collaborations reflect a growing strategic convergence to counter the influence of China, North Korea and Russia in the region. Despite progress, challenges remain in trilateral relations:
    - Historical tensions. The dispute between South Korea and Japan over World War II war crimes remains an unresolved sore point.
    - The fall of the ruling People Power Party after Yoon's failed self-coup in 2024 and the victory of the Democratic Party, critical of Yoon's foreign policy, could affect trilateral cooperation.

Conclusion

The United States, under President Joe Biden, has materialised its free and open Indo-Pacific strategy by integrating its traditional allies and new partners, establishing collaborative networks and building a strategic convergence that, to a greater or lesser degree, has been joined by Japan, South Korea, Australia, the Philippines and India under the shared perception of the Chinese threat.

The US strategy has advanced security ties with AUKUS, the Quad, bilateral agreements with the Philippines and Japan, and trilateral rapprochements, but also introduces the economic variable with programmes such as the Indo-Pacific Economic Framework for Prosperity, which seeks to be an alternative to the challenge posed by a dual relationship with China. In other words, the separation of the security and economic spheres of the old "Kissinger order" is being reversed, the four spheres of power are being reintegrated and securitised, and progress is being made towards a selective decoupling-bifurcation that is still uncertain.

China, for its part, has continued to expand the maritime branch of the Silk Road which, according to data from the State Council of the People's Republic of China (PRC), has reached 117 ports in 43 countries[51] and has consolidated its dominance in overseas ports, especially in the global south. Like the US, it is broadening its foreign policy focus to other domains, in this case beyond economic and energy concerns into politics and security, with a marked increase in military capabilities in all areas of warfare, as well as pursuing an offensive foreign policy in support of its maritime claims.

The Indo-Pacific thus consolidates itself as a strategic space of regional competition. Thus, from a broader perspective, the Indo-Pacific acquires a global dimension by linking up with the India-Middle East-Europe economic corridor. This corridor, designed to strengthen connectivity between Asia, Europe and the Gulf, has the potential to reshape trade and energy routes by establishing a direct counterweight to the China-led Belt and Road Initiative. In this context, along with the Abraham agreements, the US, India and the EU emerge as a key tool for altering power balances in Eurasia, strengthening relations between Israel and the Gulf states while weakening the alliances of China, Russia, Pakistan and Iran.

Similarly, if one takes into account the impact of open conflicts such as the wars in Ukraine and Gaza and the disputes in the South China Sea and the Taiwan Strait, where Beijing seeks to consolidate its strategic control over essential maritime routes, one can appreciate how both conflicts and strategic projects are part of a broader struggle for global hegemony, where the dominance of the *rimland* - according to Nicholas Spykman's

[51] China Daily (2023). The Belt and Road Initiative: A Key Pillar of the Global Community of Shared Future [online]. *China Daily*. [Accessed: 2025]. Available at: https://global.chinadaily.com.cn/a/202310/11/WS6525de2ba31090682a5e7d01.html

concept - becomes fundamental. Control of these peripheral regions not only determines the power projection of the great powers but also redefines the dynamics of influence in the international system.

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