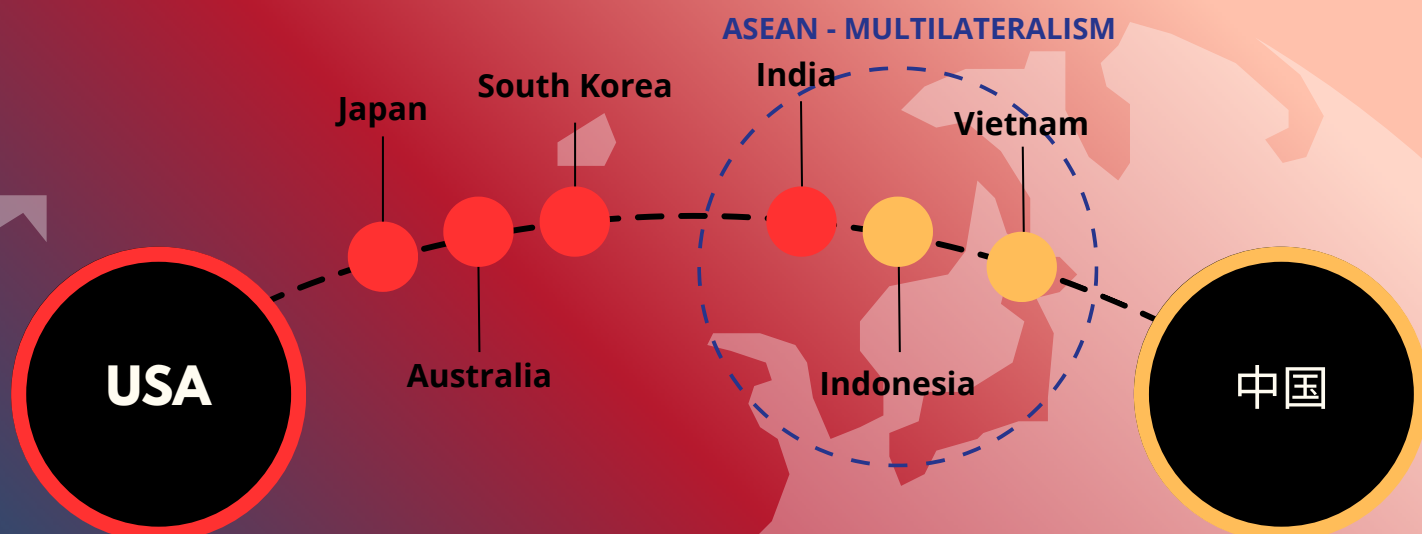


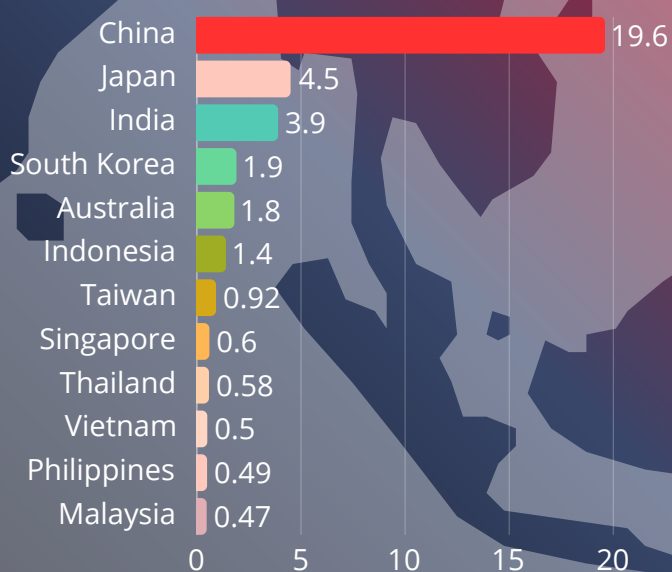
EAST ASIA: BEYOND THE DUEL

HOW REGIONAL POWERS ARE STEPPING UP ?

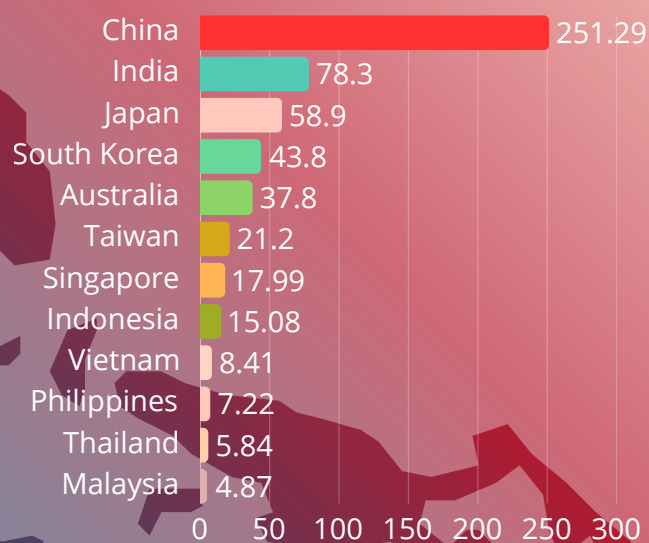
ASEAN - MULTILATERALISM



GDP 2025 (USD Trillions)



Defence budget 2025 (USD Billions)



4.3 billion of people
more than 50%
of the world's population

1/3 of the world's economic activity
is concentrated in the Indo-Pacific

\$31.7 trillion

GDP of the 5 largest regional economies

\$21.2 trillion

for the European Union

Total Asian defence budget
(Exc. Afghanistan, North Korea, Laos)

\$573 billion

\$864 billion

for the European Union

\$921 billion

for the USA

Asia's total defence budget increased by 5.7% compared with 2024 and China accounts for around 40% of Asia's defence spending and has grown continuously since 2008.

60%

of global trade transits
through Indo-Pacific maritime
routes.



"String of Pearls"

China's offensive strategy to
secure its hydrocarbon supplies
and exports.

JAPAN

Zones of tension

in the South China Sea
following China's seizure of
islets within neighboring
countries' EEZs.



Military bases

The United States, France, and
Australia are deploying significant
military assets to secure trade
routes and defend their interests,
notably alongside India and Indo-
Pacific coastal nations.



Economic partnerships

- Trade
- Investments
- Global value chains



Security partnerships

- Alliances
- Military exercises
- Intelligence sharing



Military build-up

- Naval capabilities
- Missiles
- Drones
- Submarines



Diplomatic hedging

- Cooperation with Washington & Beijing
- Flexible coalitions
- Non-alignment

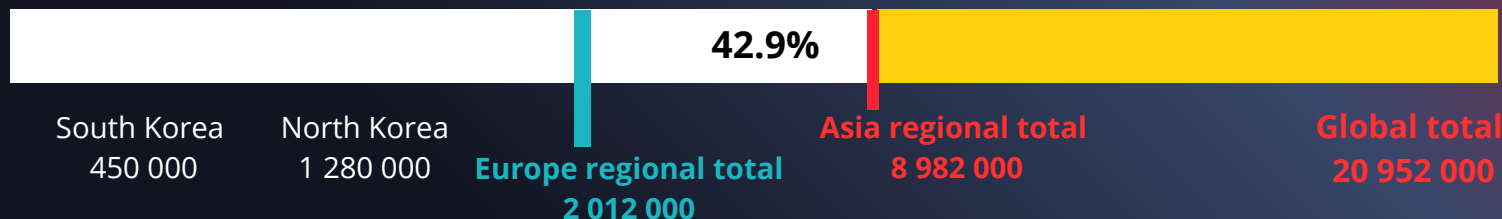


Multilateral platforms

- ASEAN
- QUADS
- AUKUS
- RCEP
- CPTPP

Regional Top 5 active military personnel

France 203 900	Pakistan 660 000	India 1 500 700	China 2 035 000
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Key Strategic Partnerships

QUAD

Quadrilateral Security Dialogue

- Focuses on **maritime security, critical technologies, cybersecurity, supply chains and infrastructure.**
- **Not a military alliance,** but a strategic coordination framework in response to China's growing influence in the region.



AUKUS

Defence partnership

- **Cooperation between Australia, the UK and the US to strengthen deterrence and military capabilities in the Indo-Pacific, established in 2021.**
- Its flagship initiative is to help Australia acquire nuclear-powered, conventionally armed submarines using US and UK technology.



ASEAN

Association of Southeast Asian Nations

- A regional organization that **promotes political, economic and security cooperation among Southeast Asian countries.**
- It aims to facilitate trade, investment and regional economic integration and is a central component of the Indo-Pacific economic architecture.
- Plays a **key role in maintaining regional dialogue and stability,** including through platforms such as the ASEAN Regional Forum and the East Asia Summit.
- **China is an ASEAN partner, but not an ASEAN member.**



RCEP

Regional Comprehensive Economic Partnership

- It is a **free trade agreement** covering 15 countries in the Indo-Pacific, making it the world's largest free trade bloc by economic weight.
- **China is part of RCEP,** making it particularly important in the economic architecture of the Indo-Pacific.
- RCEP represents roughly **30% of global GDP and around 30% of the world's population,** making it a major pillar of Indo-Pacific economic integration.



INDIA



Strategic autonomy

India maintains a tradition of non-alignment while participating in both BRICS+ (expanded since 2024 to include Egypt, Ethiopia, Iran, Saudi Arabia, and the UAE, joined by Indonesia in January 2025) and the QUAD, reflecting its multi-alignment strategy between major powers.

JAPAN



Embracing rearmament

Treaty ally of the US. Tokyo is pursuing gradual rearmament and diversifying its security partnerships toward Southeast Asia, India, and Europe.

SOUTH KOREA



Assumed ambivalence

Security alliance with Washington against North Korea, while maintaining strong economic ties with Beijing.

AUSTRALIA



Security pivot

Member of AUKUS. Strengthening relations with the US while remaining economically dependent on raw material exports to China.

INDONESIA



"Bebas Aktif" (Free and Active) doctrine

Prioritises regional stability and partner diversification. Pursues non-exclusive alignment.

VIETNAM



"Bamboo diplomacy"

Strong economic and ideological ties with China, but tensions in the South China Sea. Strengthening ties with the US, Japan, and India without forming formal alliances.

SINGAPORE



Strategic autonomy

Strong economic ties with China and close security and defence cooperation with the United States. Singapore seeks to preserve its strategic autonomy by maintaining balanced relations with both powers while strengthening ASEAN centrality and multilateral partnerships.