KONRAD ADENAUER STIFTUNG



INDO-PACIFIC MARITIME DIALOGUE

Honolulu, October 2026

Foreword

The seas of the Indo-Pacific carry much of the world's trade and energy supplies and have increasingly become an arena of strategic competition. Developments in the region affect not only Indo-Pacific countries but also Europe, which depends on open sea lanes and a stable regional order.

Against this backdrop, the Konrad-Adenauer-Stiftung Korea Office organised a seminar and a closed roundtable in Honolulu from 13 to 15 October 2026. Experts from India, Japan, the Philippines, Singapore, South Korea and Taiwan exchanged views with one another and with American participants on maritime security challenges and opportunities for cooperation.

This publication brings together six country perspectives developed following these discussions. Each author examines maritime security challenges from their respective national perspective and offers policy recommendations. The views expressed in this publication are those of the individual authors and do not necessarily reflect the positions of their respective institutions or the Konrad-Adenauer-Stiftung.

We would like to thank the authors for their valuable contributions, the East-West Center for its cooperation, and all participants for their open and constructive exchange. We hope this publication will contribute to a deeper understanding of maritime security challenges in the Indo-Pacific and encourage further dialogue and cooperation within the region and beyond.

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Seoul, November 2026

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COUNTRY PERSPECTIVE · PHILIPPINES

Indo-Pacific Challenges in the Maritime Sphere: A Philippine Outlook

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Key Takeaways

The Philippines is at the geopolitical centre of the Indo-Pacific, straddling both the maritime domains of the South China Sea and the First Island Chain.

Despite concerns with US domestic priorities, the Philippines and other US allies want more, not less, US engagement, and seek to create the appropriate strategic environment for this.

Prioritising the adoption of a coherent strategy should be the primary concern of the Marcos Administration as the country moves towards a political transition in 2028.

The Philippines' Perspective on Indo-Pacific Maritime Security

In his 2026 State of the Nation Address made at the halls of the House of Representatives, President Ferdinand "Bongbong" Marcos Jr. made his strongest pronouncement yet regarding the disputes with China over some parts of the South China Sea. Quoting the national anthem, Marcos said that "we will never surrender to would be conquerors"[1] (own translation). This was in response to Chinese propaganda depicting Filipinos as monkeys, one among the many instances where the People's Republic of China continues with what has been locally labelled as ICAD (illegal, coercive, aggressive, deceptive) strategy towards the Philippines.

Between September and October, incidents between the two countries have increased[2] including six engagements between the Chinese Coast Guard and the Philippine Coast Guard in Scarborough Shoal, Second Thomas Shoal, and the Spratlys. Chinese ambassador to the Philippines Jing Quan made incendiary statements[3] and was promptly summoned by the Department of Foreign Affairs and strongly reminded to behave properly; Foreign Affairs Secretary Maria Theresa Lazaro called Jing Quan's statements "provocative and unacceptable."[4]

Defence Secretary Gilberto Teodoro has been strident in his criticism of Chinese behaviour in the South China Sea and has been met with sanctions[5] and public attacks by the Chinese government both in Manila and abroad.[6] Teodoro is at the forefront of a more robust response[7] to China; he suspended military-to-military communications between the two countries, supported law enforcement efforts against alleged illegal Chinese workers in Southern Philippines, warned about the security implications of educational exchanges with China, and labelled China as the region's "troublemaker". China's aircraft carrier group also recently transited through the waters[8] of Philippines' sub-archipelago, Mindanao; the Philippine Navy shadowed the group and issued radio challenges, which were unmet by the Chinese vessels led by the Liaoning carrier.

China and its aggressive and increasingly targeted challenges to the Philippines remain to be the top maritime security concern. Both states are in an intractable conflict over the 2016 Arbitral Award; the Philippines will never back down from the award and China is firm in its opposition to it.

All of the above reflect not just bilateral tensions with the People's Republic of China, nor the frictions that naturally rise from the deepening of the alliance between the Philippines and the United States; they reflect the world's on-going adjustments in the international order, projected on to the maritime domain in the Indo-Pacific.

Reflections from the Dialogue in Honolulu and Prospects for Regional Cooperation

The US remains, therefore, vital to its allies and partners in Northeast and Southeast Asia. It cannot easily be extricated from defence and foreign policy considerations, nor could it be ignored. What I observed in Honolulu, however, is that both the US and its allies are grappling with aligning defence and security policies given the constraint imposed by US domestic political concerns, and the way that the global and regional strategic environments have been affected by these apprehensions.

Connecting the spokes[9] should be an overriding concern among the US allies. Even within minilateral contexts, all spokes are not concerned with US disengagement nor withdrawal per se. Instead, their priority has been about ensuring US commitment to regional alliances and to the region. US allies have been closely working with the Philippines on defence and security issues bilaterally (and trilaterally in some) but have also participated in US-Philippine defence and maritime activities such as the Balikatan Exercises.

Japan, South Korea, Taiwan, and the Philippines are US allies that are starting to invest in domestic and regional defence while using and building on existing US defence industrial base. The four are not hedging against the US. Instead, they are bolstering bilateral and even trilateral relations with one another while not outrightly excluding the US in the process. They are creating additional pathways for US engagement, absorbing some of the burdens, and effectively making themselves essential in any offshore balancing strategy.

In 2017, President Trump described the Philippines as,[10] "the most prime piece of real estate from the military standpoint," which does reflect the rise of the Philippines as a geopolitical centre of gravity. Straddling both the critical sea lanes including the South China Sea, and the First Island Chain, the

Philippines has seen its status rise in the architecture of the US alliance system. Trump's description of the Philippines remains to be apt: the Philippines is at the forefront of confronting Chinese aggressive activities and does not hesitate to call out its bad behaviour at sea. Even now, the Philippines is experiencing China's intense efforts[11] to influence its domestic politics.

The Philippines, however, remains to be the weakest materially among US allies, and therefore, regional cooperation is vital to its continuing relevance. China has not been deterred and continues to conduct maritime coercion activities that contests the Philippines' ability to defend its sovereignty and restricts the exercise of its sovereign rights. US allies must understand that if the Philippines were to give in, the repercussions on regional stability will be severe and the balance of power will be tipped against all.

In Honolulu, participants from Japan, Korea, India, Singapore, the Philippines, and Taiwan saw convergence in two important matters. Firstly, the concept of the grey zone is worth re-examining as it has become a crutch for how states are dealing or not dealing with aggressive and assertive actions by China. Secondly, regional coastguards are being given mandates beyond what they have held before, for example, serving as frontline forces in the South China Sea. States should examine to what extent they are willing to have their coastguards adopt or adapt to new roles that go beyond maritime safety.

Policy Implications and Recommendations

The Philippines' ability to resist Chinese ICAD activities[12] is crucial to Indo-Pacific stability. While the West Philippine Sea remains one of the country's core national maritime security concerns, the current situation exposes the Philippines' limitations in responding to China's coercive and intrusive activities. Domestically, it cannot concede sovereign rights that the 2016 Arbitral Award has reaffirmed, but it neither has the military wherewithal nor the economic resources to sustainably confront the Chinese PLA Navy and the Chinese Coast Guard. The Philippines also needs to understand that Chinese behaviour will not change unless the Philippines starts to accept that potential military risks are the necessary trade-offs in protecting its sovereign rights.

- **Continue building the SQUAD**. An immediate pragmatic recommendation is to continue building the SQUAD, an informal meeting among the defence ministers of the United States, Japan, Australia, and the Philippines. At the sidelines[13] of the ASEAN Defence Ministers Meeting-Plus in Cebu in October 2026, Secretary Pete Hegseth, Defence Minister Shinjiro Koizumi, Minister Richard Marles, and Secretary Gilberto Teodoro met informally but made maritime security cooperation a major point of discussion. The ministerial meeting is part of a continuing process, which saw the four countries engage in maritime cooperative activities[14] within the Philippines' exclusive economic zones.
- **Adopt a theory of victory.** An effective and more durable response to Chinese coercion needs to be holistic on the part of the Philippines. Its allies and partners must find ways to help the Philippines find this approach. The Philippines' national security community needs to focus on defining a theory of victory[15] for the country where desired outcomes are identified to deploy the necessary instruments to attain them.

  To date, my observation in 2024[16] remains valid: "It (the Philippines) must elaborate in no uncertain terms its vision and political objective for its portion of the South China Sea and develop its strategic narratives around these vision and objectives. It must be able to define the contours of an acceptable modus vivendi in the South China Sea and impose a fait accompli on China." This basic requirement remains to be missing[17] as evidenced by how each government agency has differing approaches and publicly contradict each other.

- **Focus the theory of victory to a three-pronged strategy.** A colleague and I envision this strategy[18] to focus on three main activities: 1) diversification of essential supplies to prevent developing

economic dependencies toward China, 2) increased and sustained funding for the Armed Forces of the Philippines (AFP) Modernization Program, and 3) making any future discretionary cooperation with Beijing contingent on how they behave at sea. Completely ruling out any cooperation with China would be foolish, but the Philippines can create the terms of reference for this cooperation, and back this up with the support of its ally and partners.

- **Define a non-partisan and long-term grand strategy.** A more important activity that Manila's leaders should undertake is to reflect on the country's theory of security, i.e. answering the question of "what will make the Philippines secure?"[19] The Philippines will have to organise its diplomatic, informational, military, and economic power to pursue and defend its sense of security and preserve the state's national interests. The concern is not over short-term wins but securing an advantageous strategic position in the medium-to-long term.

Moving Forward

Despite being strategically located in the Indo-Pacific, the Philippines can lose all the advantages if it does not adopt a more coherent strategy and establish a national security process that eliminates redundancy and reduces the friction among constituent government offices. Effective political leadership will be critical as the country prepares for presidential transition in 2028. Reviewing existing institutional mechanism, reforming what can reform, and recommending a strategic pathway should be something that the Marcos Administration should prioritise.

Chinese maritime coercion will remain for decades, with global and regional instability as the prevailing strategic picture and great power competition will be the rule. These challenges will continue to dominate the national security concerns of the Philippines. The maritime domain will be the theatre for competition and coercion; Manila is investing[20] in asymmetric defence capabilities, alliance modernisation, and minilateral activities to respond to maritime challenges. Gaining strategic leverage should be Manila's short-term goal, but it needs a holistic strategy to protect its national interests particularly in the maritime domain.

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COUNTRY PERSPECTIVE · SINGAPORE

X-Factor: Singapore at the Crossroads of the Maritime Asia-Pacific

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Key Takeaways

The freedom of navigation is of the utmost importance to Singapore, located at the heart of the Asia-Pacific.

Contemporary challenges to regional maritime security include traditional threats from the South China Sea disputes or a Taiwan contingency, as well as non-traditional threats like sea robbery.

Cooperation between Europe and Southeast Asia has to be based on mutual benefit and true understanding.

Singapore's Perspective on Asia-Pacific Maritime Security

The Asia-Pacific is arguably unique, a predominantly maritime region at scale. Barry Buzan and Ole Wæver identify it as a "supercomplex" – the only one globally – due to regional security interdependence as well as its security penetration by extra-regional powers, such as the United States and China. It is precisely the region's maritime nature that allows for these. After all, power and threats, whether traditional or non-traditional, are still subject to the tyranny of distance, with maritime communications remaining their vital conduit even today.

Singapore is a small island-state, but it is geostrategically located right at the heart of the supercomplex, sitting amidst the narrow strait connecting the Indian and Pacific oceans.

The city-state has derived advantages from this, such as functioning as a hub for entrepôt trade following colonisation by the British. However, the small size of the island, with neither hinterland, natural resources nor strategic depth, also means that the city-state is dependent upon the continued flow of goods along these sea lines of communications, east and west, for its very survival.

Singapore's then prime minister, Lee Hsien Loong, emphasised[1] during his 2016 national day rally, the most important political speech of the year domestically, that: "We have two vital sea lanes of communications, two arteries . . . You block one, you die". Regional maritime security is therefore of utmost fundamental importance to Singapore.

The keystone of maritime security today is the United Nations Convention on the Law of the Sea (UNCLOS). The agreement safeguards the rights of littoral states and the freedom of navigation enjoyed by seafaring states, both crucial to Singapore. Singapore even took a leading role in the development of UNCLOS, with its diplomat, Tommy Koh, serving as the president of the 1982 conference agreeing to UNCLOS.

Nonetheless, for Singapore, there are various contemporary challenges to maritime security and risks to the freedom of navigation, both conventional and non-traditional.

One major concern is the South China Sea disputes. Although Singapore is not a claimant, its interests lie in the freedom of navigation, stability in the Southeast Asian region, and unity in the region's representative organisation, the Association of Southeast Asian Nations (ASEAN).

As Lee said[2] in a foreign policy speech in 2015, Singapore must "defend the rights of freedom of navigation and overflight", especially with regard to the SCS as provided for by UNCLOS, as "a way of arbitrating and resolving disputes peacefully."

On this basis, Singapore supported the 2016 arbitral tribunal in favour of the Philippines and against China. However, a decade on, the Philippines was the only ASEAN member of the fourteen states that signed a joint declaration commemorating the ruling's tenth anniversary.

Regardless, Singapore continues to back the negotiation for a Code of Conduct in the South China Sea (COC) under the ASEAN ambit, towards the effect[3] of "maintaining peace, stability, safety, security, unimpeded lawful maritime commerce, freedom of navigation in and over-flight" in the South China Sea, along with "non-militarization" and the peaceful resolution of disputes "in accordance with international law".

Beyond Southeast Asia is the question of a Taiwan Strait contingency. This latter is actually far more a flashpoint than the former, both in likelihood and consequence. Taiwanese independence is a Chinese red line whilst the South China Sea disputes has broadly remained the status quo in substantive terms for quite a while now; and it will be far more difficult to limit a conflict in the Taiwan Strait versus one in the South China Sea, with even a blockade creating[4] "escalatory pressures that are difficult to contain and could lead to a large-scale war".

Nonetheless, this is not to say that a Taiwan conflict is urgent and likely. Rather, the bottom line that there is no incentive for China to suddenly invade Taiwan, red line aside, has not changed. Stability and the long game suits China much more than a very costly resort to force, as any large-scale attack upon Taiwan must be, notwithstanding the so-called Davidson window or other similar projections, which are not based upon actual intent, but simply projected capabilities or forecasted ambitions.

Because a Taiwan Strait situation will be very difficult to contain, such a scenario will affect Southeast Asia more likely than not, demonstrating the security penetration by the great powers in the Asia-Pacific supercomplex. Leaving aside the actions of US allies, such as the Philippines, even if other Southeast Asian states may not be directly involved in the conflict, the Straits of Malacca and Singapore – henceforth the "Malacca Straits" in short – will be a crucial conduit for the warring parties that are, such that they will want to be able to control access through the international straits.

At the same time, Singapore has a memorandum of understanding with the US regarding its use of Singapore's facilities, with the US Commander, Logistics Group Western Pacific, established in Singapore's Sembawang since 1992, after relocating from the Subic Bay in the Philippines, though this is not equivalent to Singapore hosting a US military base.

Given these, various people have asked about Singapore's actions and responses if it comes to the US fighting a war with China over Taiwan, though there is no straightforward answer here. Much of it will depend on the origins and *casus belli* of such a war, though such a state of affairs is the last thing that Singapore wants.

Singapore will certainly not agree to a closure of the Malacca Straits for reasons of war between the great powers, although whether it contests, militarily, a closure, is another thing altogether.

In addition to the more conventional aspects of maritime security, Singapore also stresses the unconventional, such as sea robbery in the Malacca Straits. The nature of such non-traditional security challenges is that they tend to be non-military and transnational, therefore requiring international cooperation to resolve. Singapore thus practises two key initiatives in this regard.

The first is the Malacca Straits Patrol – originally coordinated sea patrols between Singapore, Indonesia and Malaysia from 2004, before Thailand joined in 2008 – to ensure security in the waterway after the September 11, 2001 attacks on the US, with increased awareness of the linkages between piracy and terrorism. Though there are some problems with this framework, such as not actually being transboundary as opposed to cross-boundary, it remains one of the most effective mechanisms of regional maritime security, managing to reduce sea robbery in the Malacca Straits, although there has been a resurgence in recent years.

Second, Singapore sees increased and shared maritime domain awareness as a means to combat such unconventional security challenges. It therefore established the Information Fusion Centre in 2009, hosted by the Singapore Navy and comprising more than forty international liaison naval officers from the region to build up a common picture to better safeguard maritime security. Naturally, however, there are sometimes sensitivities when it comes to information sharing, which may cause various guardedness in such sharing.

Last but not least, there is a rising confluence between traditional and non-traditional security challenges, which is sometimes likened to "grey zone threats". The significant event for Singapore in this was the 2018 Tuas incursions, in which Malaysia unilaterally expanded its port limits into Singapore's territorial waters, with Malaysian government vessels subsequently intruding into these areas.

After a diplomatic resolution between the two neighbouring states, Singapore established[5] a new Maritime Security Response Flotilla in 2021 to "develop and operate calibrated capabilities to provide" Singapore "with more options to respond to maritime incidents". Singapore also launched its first white-hulled Sentinel-class offshore patrol vessel – built by Germany and based on the Potsdam-class operated by Germany's Federal Police – recently in October 2026, to better combat these maritime threats "below the threshold of war".

Reflections from the Dialogue in Honolulu and Prospects for Regional Cooperation

Although maritime security must self-evidently be critical for the Asia-Pacific supercomplex, it is also clear from the many discussions over the days of the dialogue programme organised by Konrad-Adenauer-Stiftung-Korea that there are differing threat perceptions as regards such between the various states within the supercomplex.

This explains the difficulty in a unified ASEAN position on the South China Sea dispute, beyond a basic COC. The Philippines, for example, clearly regards China very differently from Singapore. Nor does Singapore see China in the same way as Korea or Japan, if only due to geographical proximity or distance.

The issue with the COC, however, besides the long-running deliberations over decades, is not whether it is legally-binding, but that it is not a silver bullet to resolve the disputes as it will only govern conduct rather than determine sovereignty issues.

Simultaneously, and in spite of its stance encouraging the freedom of navigation, Singapore is less enthusiastic about freedom of navigation operations (FONOPS) in the South China Sea by the United States or its other allies. Asked about Singapore's endorsement of US FONOPS in 2015, Lee had avoided the question, emphasising[6] that FONOPS was "completely understandable", whilst also noting that it was "also understandable that the Chinese" sees the practice of FONOPS as increasing regional tensions.

In this manner, Singapore is neither choosing the US nor China. Instead, it is choosing its own side of the freedom of navigation and maritime security, acting towards these as it deems appropriate towards securing its own (maritime) interests, as Singapore's defence minister, Chan Chun Sing, highlighted[7] in a question-and-answer session during a lecture commemorating the thirtieth anniversary lecture of Singapore's S. Rajaratnam School of International Studies. This explains Singapore's attitude towards US FONOPS.

It is therefore in Singapore's interests to see greater involvement by other powers in the Asia-Pacific region, whether India, Japan, Korea, Germany or the European Union (EU), such that Singapore is able to maintain its own strategic autonomy instead of being drawn into US-China rivalry.

As Singapore's first foreign minister, S. Rajaratnam, had emphasised back in 1976: "like the sun, all great powers exert gravitational pulls on weaker nations . . . When there are many suns the gravitational pull of each is not only weakened but also, by a judicious use of the pulls and counterpulls of gravitational forces, the minor planets acquire a greater freedom of navigation".[8]

Policy Implications and Recommendations

However, collaboration cannot be unidirectional. The ASEAN states must also give these external parties reasons to commit themselves to the region. After all, it takes two hands to clap, a point that I have made[9] before.

One proposal here may be advancing an ASEAN-EU free trade agreement to mutual benefit, which was one of the points of agreement between Singapore and Germany during[10] Chancellor Friedrich Merz's visit to the island-state in October 2026.

Regardless, external involvement in Southeast Asia must also be based on a greater understanding of the regional states and their differences, whether in terms of threat perceptions or other issues, despite a basic commonality of interest in broadly maintaining maritime security, such that any cooperation and

collaboration is worthwhile and meaningful, instead of adding unnecessarily to regional tensions or instability.

Even the US, as an Asia-Pacific power, is typically[11] "either neglectful or narrow – or both – in its thinking about Southeast Asia".[12] Personally, I have had many discussions with US government officials, or think tankers and the like, whether based in the region or outside, where this was obvious.

In order for states outside of the supercomplex to better understand Southeast Asia, sustained dialogue with the region via regular exchanges and visits between European and Southeast Asian institutions, for example, may be the *sine qua non*, rather than one-off, feel-good actions, even large-scale ones such as the French *Pégase* missions, such that cooperation is built upon true understanding.

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KONRAD ADENAUER STIFTUNG

COUNTRY PERSPECTIVE · SOUTH KOREA

Maritime Security in the Indo-Pacific: A Korean Perspective

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Key Takeaways

Coast guard cooperation offers a way to address grey-zone threats while limiting escalation, but its effectiveness depends on overcoming legal, institutional, and capacity gaps.

Narratives such as "grey-zone tactics" and ICAD shape threat perceptions and policy responses, but terminology must accurately capture China's coercive conduct and guide practical action.

Declining and uncertain US engagement is reshaping regional security calculations, requiring Indo-Pacific countries to prepare for fluctuating support rather than expect a return to previous levels of US commitment.

Korea's Perspective on Indo-Pacific Maritime Security

Regional maritime security issues require attention to both their distinct characteristics and their interconnections. Taiwan presents territorial and military challenges alongside the humanitarian consequences of a potential crisis. With more than one million Southeast Asian nationals residing in Taiwan, regional countries must consider civilian protection and evacuation as well as the implications of conflict for regional security.

In the South China Sea, territorial and sovereignty disputes intersect with military tensions. Managing these traditional security threats requires parallel efforts to address transnational crime, disasters, and illegal, unreported and unregulated fishing. Stability therefore depends on both managing interstate tensions and cooperating on challenges that individual countries cannot adequately address alone.

The Strait of Malacca requires a different approach. Its littoral states have managed threats relatively effectively through two cooperative frameworks, but potential disruptions to maritime routes and supply chains remain a concern. The possible consequences of a closure of the Strait of Hormuz illustrate the wider risks associated with maritime chokepoints. Competition over mineral resources also shapes the regional maritime security environment.

In the South Pacific, intensifying strategic competition raises questions about changing interstate relations and the potential use of regional locations as forward deployment bases. These developments require assessment of their implications for the broader regional security landscape.

South Korea has traditionally been cautious about taking clear positions or active measures on regional maritime security. This reflects its security commitments on the Korean Peninsula and limited available capabilities, alongside concerns about direct Chinese pressure and Beijing's influence over peninsula affairs. Its approach therefore results from a combination of domestic security priorities, resource constraints, and pressures in its relationship with China.

This caution does not indicate limited concern. A Taiwan crisis could disrupt semiconductor supply chains and major sea lanes, including the Bashi Channel. Chinese control over Taiwan could also expand Beijing's regional influence, affecting both South Korea's economic interests and the regional balance of power.

South China Sea stability is similarly important to South Korea's maritime transport and economy, as well as its relationships with Southeast Asian partners. The Korean Peninsula and surrounding maritime areas are closely connected, making regional peace and stability directly relevant to South Korea's security and prosperity.

Recognition of these connections is encouraging support for a more active South Korean role. Intensifying US–China competition, regional instability, and a weakening rules-based order are increasing external demands for engagement. Domestically, growing capabilities, international standing, and expectations from other countries are strengthening the view that South Korea should assume greater responsibilities.

However, changing perceptions will take time to translate into sustained action. Peninsula security commitments, capability constraints, and relations with China continue to limit South Korea's options. Its regional maritime security role will therefore need to expand gradually as it manages these practical constraints.

Reflections from the Dialogue in Honolulu and Prospects for Regional Cooperation

Coast guards can play an important role in regional maritime security cooperation. Their advantages are particularly apparent when responding to grey-zone strategies that exert pressure below the threshold of military conflict. Deploying naval forces risks escalating an interstate confrontation into a military clash, whereas coast guards can help manage tensions at a relatively lower level by operating within a maritime law enforcement framework. In this respect, coast guards offer a useful means of responding to maritime disputes while limiting the risk of full-scale military conflict.

Coast guard cooperation nevertheless faces clear limitations. Coast guard operations are closely tied to each country's legal authority and maritime jurisdiction, making it difficult to extend them into coordinated regional responses across national boundaries. Differences in institutional affiliation, command structures, and legal status also complicate cooperation. This institutional fragmentation is compounded by substantial disparities in equipment, personnel, and operational capabilities. Making coast guard cooperation more effective therefore requires moving beyond agreement on its importance to address differences in jurisdiction and institutional arrangements, as well as imbalances in capacity.

In the South China Sea, how China's conduct is characterised is closely connected to how other countries respond. The widely used term "grey-zone tactics" helps describe Chinese activities that fall between peacetime conduct and military conflict. At the same time, it can obscure the risks and coercive nature of those activities. Defining a threat as a grey-zone issue may also leave the standards and instruments of response similarly ambiguous. The Philippine government's use of the concept of ICAD can be understood as an attempt to characterise more clearly aspects of China's conduct that existing terminology does not adequately capture.

However, the practical contribution of refining concepts and narratives deserves scrutiny. If China is applying physical force on the ground while other countries devote excessive time and resources to refining terminology and discourse, their practical responses may fall behind. Changes in terminology may also distract from the central problem rather than clarify it.

Nevertheless, narratives remain important. How a problem is named and explained shapes perceptions of the threat and influences which responses are considered legitimate or necessary. The central question is therefore which narrative to adopt and how to connect it to concrete policies and actions. What is needed is a conceptual framework that accurately describes China's conduct while helping guide practical responses.

Declining US engagement affects individual maritime security issues and the broader Indo-Pacific security order. Taiwan illustrates how uncertainty over US support and involvement can shape the security calculations of countries across the region. This uncertainty is unlikely to disappear in the short term. Regional countries therefore need to treat it as an enduring consideration in policymaking.

There are also reasons to be cautious about expecting the US midterm elections to substantially alter this trajectory. Although the results may affect the administration's ability to implement its policies, it remains uncertain whether they would fundamentally change President Trump's inclination to pursue foreign policy according to his own preferences, particularly as he is not seeking reelection. Regional planning should therefore focus on responding to changes in US policy and fluctuations in engagement, with limited expectations that US involvement will return to previous levels after the midterms.

Policy Implications and Recommendations

Institutionalise Strategic Dialogue among Coast Guards

For coast guards to expand their role as key actors in regional maritime security, they need a perspective that extends beyond safety within their jurisdictions and responses to immediate traditional and non-traditional security challenges. Regular strategic dialogues should therefore be established among regional coast guards, beginning with exchanges of assessments of the maritime security environment and major threats among like-minded countries. These dialogues should support operational information sharing and cooperation while helping coast guards understand their activities within the broader regional security context.

Assess Whether Existing Alliance Arrangements Meet Regional Security Needs

Attention should extend beyond whether regional countries are seeking to move away from existing alliances to whether current alliance arrangements adequately address their changing security needs. In particular, it is necessary to examine what support and response options alliances can provide against maritime coercion and threats below the threshold of military conflict. This assessment should guide efforts to narrow the gap between alliance commitments and actual response capabilities and strengthen cooperation that addresses regional countries' security needs.

Revitalise Existing Cooperation Frameworks and Strengthen Regional Leadership

Countries should bring their capabilities together through multilateral, minilateral, and bilateral frameworks to address practical maritime security challenges. Appropriate arrangements should be selected according to the objectives of cooperation and the capabilities of participating countries, with concrete tasks guiding efforts to strengthen collective response capacity. Sustaining these efforts requires regional leadership capable of setting priorities, coordinating national interests, and driving the implementation of agreed measures.

Bridge Differences among Southeast Asian Countries and Build a Shared Understanding of Security Interdependence

Sustained coordination is needed to prevent differences in threat perceptions and policy priorities among Southeast Asian countries from obstructing collective responses. Countries should move beyond viewing threats as isolated national concerns and jointly assess how instability in one area affects other countries' sea lanes, supply chains, and security. Understanding the region as an interconnected security space can help build shared threat perceptions over time and expand cooperation, starting in areas where agreement is achievable.

Strengthen Practical Incentives for Participation in Regional Cooperation

The tangible benefits of participation should be increased so that low expectations of existing regional frameworks do not lead to stagnation. Cooperation should demonstrate its value through information sharing, capacity building, joint exercises, and other activities that address participating countries' actual needs. Participation burdens should also be adjusted to enable countries with limited capabilities to remain engaged, while ensuring that the benefits of cooperation reach participating states.

Pursue Maritime Security Cooperation with Europe Based on Available Capabilities and Geographic Constraints

Maritime security cooperation between European and Indo-Pacific countries should set realistic objectives that account for Europe's own security demands, limited naval capabilities, and geographic distance. Given the constraints on expanding Europe's direct military contribution, diplomatic and institutional cooperation to strengthen the rules-based order and international law should take priority at this stage. Such efforts should help develop common positions on coercive maritime behaviour and strengthen the foundations for sustained solidarity with Indo-Pacific countries.

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COUNTRY PERSPECTIVE · INDIA

Cooperation That Holds on the Worst Day: An Indian Perspective on Indo-Pacific Maritime Security

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Key Takeaways

Most Indo-Pacific cooperation structures were built to manage the maritime commons. They have adapted to contests over maritime sovereignty, but only up to a point.

The shift from a US-led hub-and-spoke model to a lattice framework is marked by a sharp decline in trust in the US as a reliable security partner, though its impact varies by state. Either way, the need to diversify, through internal or external balancing, has never been greater.

Regional states have little faith in cohesive regional responses and are investing in their own capabilities, while coercion is used to assert sovereignty and confidence-building measures are reduced to tokens of compliance.

India's maritime interests and capabilities are growing, but with its primary threats still continental, its ability to project power in the wider Indo-Pacific will remain limited. It can still contribute to regional stability by helping regulate the maritime commons.

India's Perspective on Indo-Pacific Maritime Security

India is a continental power with primary interests in the maritime domain. Over the past decade, India has become increasingly concerned about developing maritime threats in the Indian Ocean.

A maritime flank still connected to land-based threats

The Indian Navy demonstrated sea control during Operation Sindoor in 2025 by placing its carrier battle group in the northern Arabian Sea to control Pakistan's naval movements.[1] Since then, it has placed its naval assets across the Arabian Sea. In September 2026, an Indian naval ship had a maritime collision with a Pakistani naval ship, and given the lack of maritime hotlines and/or incidents-at-sea agreements, this created a significant maritime security dilemma.[2] Adding to this dilemma, the commissioning and operational presence of Pakistan's first Hangor-class submarine in 2026 has further complicated India's maritime security. Because the Hangor-class is Chinese-built and supplied, and it can integrate and launch the Babur-3 nuclear missiles, its presence also extends China's maritime footprint in the IOR through its closest partner.[3] Beyond this, the growing presence of Chinese submarines and research vessels in the IOR,[4] and China's expanding access to the region through bases and facilities in Myanmar, Bangladesh, Sri Lanka, Pakistan, and the East coast of Africa, have further complicated the maritime environment for India. India even reportedly delayed a ballistic missile test in November 2025, in order to keep Chinese maritime-surveillance activities from obstructing it.[5] Maintaining peaceful dialogue and ties along land-based borders with China, while keeping a close eye on maritime activities, is a foreign policy concern for India.

Sea lines of communication, energy and capacity

The closure of the Strait of Hormuz from late February 2026 made the energy question real for a growing Indian economy. India sent more than six warships to the Gulf of Oman and the Arabian Sea to escort Indian gas carriers.[6] In this regard, India reportedly acted independently and did not join the US-led coalition.[7] Starting from about 2026, the Indian government embarked on an ambitious defence modernisation and expenditure programme. This programme is likely to result in the Indian Navy operating more than 200 warships by the year 2035.[8] India is currently building several naval vessels and submarines. Yet the Indian Navy has reportedly faced operational challenges, as the pace of capability development has long lagged the country's security needs. In some specific domains, such as mine-countermeasures, India's challenges are more acute and need innovative solutions.[9]

Improving maritime domain awareness from the littoral to the region

India has developed its maritime domain awareness from the ground up. Following the 2008 Mumbai attacks, India created a nationwide network connecting 51 of its Naval and Coast Guard bases, with the Information Management and Analysis Centre in Gurugram directing it (2014).[10] In 2018, India set up the Information Fusion Centre for the Indian Ocean Region, and it currently has 17 country liaison officers.[11] In 2026, the Indian government approved installing satellite transponders on 100,000 fishing vessels to remove the maritime blind spots attackers used in 2008.

East of the Strait of Malacca, India's partnerships rest on a diplomacy of presence and capital rather than treaty alliances. In August 2025, the Indian Navy sailed with the Philippine Navy, even as Chinese PLA warships sailed through the South China Sea. In May 2026, India, along with other Quad members, issued a statement supporting the 2016 Arbitral Award and condemning maritime activities by Coast Guard and Militia vessels.

Reflections from the Dialogue in Honolulu and Prospects for Regional Cooperation

The meetings in Honolulu were extremely instructive in the present context. First, they helped clarify how regional stakeholders are adjusting their balancing strategies under the second Trump administration.

While alliance partners like Japan, South Korea, and the Philippines remain comfortable within the alliance (because they lack realistic options), other frontline states like Taiwan, which has depended on US support outside the alliance framework, are more anxious. ASEAN states, meanwhile, must sharpen their strategies to keep the US engaged as they rapidly diversify their security and economic relationships. For them, while the significance of countries like Canada, India, and even European stakeholders has increased, they are less willing to bet on the promise of cooperation and prefer cooperation that can deliver short-term capability gains.

Coercion from the PLAN is quickly being viewed through a common lens, one that is difficult to ignore any longer. Any hopes of accommodating Chinese red lines through deeper economic ties are also slowly being shattered. Even states like Vietnam and Malaysia are realising the limits of accommodation. However, this is leading to neither more regional security cooperation nor a regional normative response. Instead, everyone seems to be investing more in their own capability development. This is opening up space for others like India, Japan, South Korea, Taiwan, and Canada to provide necessary capabilities through their defence industry.

In the maritime domain specifically, states are realising the fast-changing nature and importance of their coast guards. In the absence of the Southeast Asia Protocol of Engagement at Sea for Coast Guard and Maritime Law Enforcement (SEA-PEACE), being developed within the ASEAN Coast Guard Forum (ACF), and the ASEAN-China Code of Conduct in the South China Sea (COC), and with increasing incidents at sea, there are no easy answers for regional states. Much interest and internal debate, therefore, focus on domestic reform to empower coast guards and streamline legislation and command structures, as coast guards emerge as the front line of security challenges. Since no one wants to signal escalation vis-à-vis China, most investment is at the coast guard level, while keeping it a civilian entity responsible for managing coastal defence. While sanguine and rational, managing the dual-use nature of coast guards will become increasingly challenging in the years ahead.

Since the Cold War, conventional wisdom has shaped confidence-building. Under this view, both sides seek confidence-building measures to avoid conflict. However, China's behaviour runs counter to this conventional wisdom. We observe that China uses CBMs as a reward to get regional states to consent to its sovereignty claims, or even to acknowledge them when they concern another state. They seem to use CBMs to ensure that initiatives like Manila's transparency initiative do not become regional and that no regional consensus on sovereignty issues can form. For capable states such as Japan and the US, this is a challenge to contend with.

Policy Implications and Recommendations

- **A Coast Guard Encounter Code.** A Code for Unplanned Encounters at Sea, adopted in 2014, mandates rules of behaviour for naval forces and is not applicable to Coast Guard forces.[12] Coast Guard forces should establish and adopt a similar code to facilitate the management of situations where personnel must apply minimum force (e.g., no one aims water cannons at people or structures, warning shots are issued before force is applied, etc.). Members of the ASEAN Coast Guard Forum should adopt and implement such a code, and China should also be invited to participate.
- **A Standard Incident Documentation Process.** A neutral body should collect time-stamped evidence and position reports documenting situations where maritime actors engage in unsafe or unprofessional behaviour. Affected parties should define and agree on standards, and make situation reports available to facilitate rapid diplomatic responses.
- **Structured information sharing, based on consensus on incident classification.** Standardising terms remains a core concern. For example, what one agency considers an instance of fishing may be construed as coercion by another.[13] A public maritime domain awareness-from-space architecture, a

law-enforcement maritime domain awareness architecture, and a trusted-partner-based maritime situational awareness architecture would enable lower- and middle-income coastal countries to participate without being part of any country's strategic framework. In the current scenario, competitors in the Indo-Pacific region should be motivated to set standards rather than develop and deploy systems.

- **The use of partners and other relevant third countries to develop and deploy mine countermeasure solutions.** The reported mining of the Strait of Hormuz in 2026 demonstrated that the existing solutions were inadequate.[14] Developing an agreed formula to distribute the burden of threats to maritime peace and stability among like-minded countries would address international community concerns.
- **Advancing India's own interests.** India should intensify efforts to conclude a navy-to-navy hotline and an agreement on incidents at sea with Pakistan. India should also use the third Coast Guard Global Summit, which it will convene in 2027,[15] to advance a draft code to prevent and reduce incidents among coast guards.
- **Europe/Germany's interests.** European stakeholders should offer realistic assessments of their interests and engagements in the Indo-Pacific. Under strain at home and with the trans-Atlantic alliance under stress, hollow promises will further damage Europe's credibility. Industry-to-industry cooperation could offer real promise in the current context, especially in emerging and disruptive technologies.

The true test of maritime partnerships and cooperation in the Indo-Pacific is whether they survive the toughest circumstances.

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COUNTRY PERSPECTIVE · TAIWAN

Maritime Security in the Indo-Pacific: Taiwan's Perspective and Pathways for Regional Cooperation

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Key Takeaways

The contest is increasingly grey-zone, not conventional. Taiwan's maritime environment has shifted from deterring an amphibious invasion to managing sustained coercion by coast guard cutters, maritime militia, survey vessels and "dark ship" tactics, with a "quarantine" scenario now a planning assumption. Partners in the dialogue described variants of the same incremental pressure.

Deterrence, grey-zone resilience and crisis management form one strategy. Responses must be credible enough to show coercion will not pay, and calibrated enough to avoid turning a law-enforcement incident into a military crisis.

Maritime security is now cross-border and cross-domain. The Bashi Channel links Taiwan, the Philippines, Japan and Korea through energy flows, trade routes and undersea cables. Maritime domain awareness (MDA) and information sharing are the most practical, least politically costly entry points for cooperation.

Practical, minilateral cooperation is the realistic path. Confidence in large multilateral forums and in the consistency of US policy is uneven. Regional states are converging on a mix of alliance, self-reliance and flexible partnerships, in which coast guards and information-sharing arrangements play a central role.

Taiwan's Perspective on Indo-Pacific Maritime Security

For Taipei, the waters around Taiwan are not only a defensive moat but an economic lifeline that is exposed to legal warfare, law-enforcement overreach and physical isolation. Beijing's operational concept aims to establish a "new normal" that erodes Taiwan's administrative jurisdiction without crossing the threshold of open war.

From Invasion Deterrence to Grey-Zone Coercion

Taiwan's defence and maritime authorities track three shifts. First, operations are no longer confined to the Taiwan Strait or the southwestern air defence identification zone; they encircle the island and reach beyond it. Second, planners increasingly anticipate a coast-guard-enforced "quarantine" rather than a sudden, high-intensity naval blockade. Third, civil and maritime forces are hybridised: coordinated fleets of China Coast Guard cutters, survey ships and militia vessels strain surveillance and obscure intent.[1]

Core Vulnerabilities

- **Sea lines of communication and energy.** Taiwan imports over 97% of its energy, and LNG reserves cover only about 7 to 14 days. Harassment or cordoning of shipping at the Bashi Channel or Miyako Strait would create an acute operational window.
- **Undersea cables.** Repeated cuts to cables serving the outlying islands show how hard it is to separate deliberate sabotage from maritime negligence, while threatening financial and digital isolation in a crisis.
- **Outlying islands.** Beijing rejects Taiwan's prohibited and restricted waters, and cutter intrusions test the tacit boundary and Taiwan's willingness to escalate. Any miscalculation in these standoffs could widen the confrontation.
- **Fleet exhaustion.** Persistent presence missions force continuous Coast Guard and Navy responses, accelerating hull fatigue and maintenance backlogs.

Taiwan's Response

Taiwan's strategy rests on three pillars. The first is **asymmetric deterrence and sea denial**: the indigenous submarine programme to contest the Bashi Channel and northeastern approaches, land-based mobile anti-ship missiles, and automated minelaying and uncrewed surface vessels for the shallow littoral. The second is **Coast Guard strengthening and interoperability**. Larger cutters are built with naval weapon mounts and fire-control foundations so they can convert to auxiliary combatants in wartime, while closer Navy–Coast Guard coordination aims to create a seamless response from law enforcement through to military defence. The third is **redundancy and internationalisation**: low and medium Earth orbit satellite terminals to reduce dependence on submarine cables, and regular partner transits that reinforce the Taiwan Strait's status as international waters.

The Dongsha (Pratas) incident in early October this year illustrates the logic that firmness within a law-enforcement framework, followed by visible restraint, can reinforce deterrence.[2]

Reflections and Prospects for Regional Cooperation

Discussions in Honolulu with scholars and practitioners from Japan, Korea, the Philippines, Singapore, India and the United States showed a strong shared diagnosis but divergent preferences on the response.[3]

Points of Convergence

- **The concept needs sharpening.** Participants noted that "grey zone" has become so broad that it constrains effective pushback. The Philippines uses the term ICAD (illegal, coercive, aggressive and

deceptive activities), but the unresolved question is the same: what legal threshold justifies a forceful yet proportionate response?

- **From "knowing" to "showing."** MDA now means documenting hostile behaviour and presenting it to the world. The Philippine transparency approach was seen as a useful model for a shared database and messaging framework.
- **Coast guards are on the front line.** Their capacities vary widely, yet law-enforcement channels offer a way to keep incidents below the military threshold. The US, Japan, Korea and India are all expanding coast guard training and exercises with partners in the region.
- **A Taiwan Strait crisis would be the most consequential contingency.** Singapore's assessment that a Strait conflict carries far higher risk than South China Sea disputes matches Northeast Asian concern for the Bashi Channel, and Southeast Asian governments face the added burden of evacuating over one million nationals living in Taiwan.
- **Cables are a shared vulnerability.** Most disruptions are accidental, but recent deliberate cuts argue for redundancy, deeper burial, diversified landing stations, stronger detection and legal prosecution, as in Taiwan's imprisonment of a vessel captain who cut cables in its waters.

Points of Divergence

- **Confidence in the United States.** Participants described weaker signals of US commitment, transactional diplomacy and reduced soft-power investment, although military-to-military and defence-industrial ties remain stable.
- **Alignment versus hedging.** Southeast Asian governments, facing energy and inflation pressures, stress decisions based on national interest rather than "choosing sides." Korea has traditionally been cautious on regional maritime issues, though domestic expectations for a larger contribution are growing.
- **Effectiveness of transparency and diplomacy.** Naming and shaming has not by itself deterred Chinese grey-zone pressure, and Code of Conduct talks and confidence-building measures are viewed with scepticism, since Beijing may treat them as rewards for compliance.
- **Sharing of sensitive data.** Cooperation on piracy, smuggling and sea robbery works well, but exchange of radar and military intelligence is constrained by mistrust and sovereignty concerns.
- **Freedom of navigation.** While Freedom of Navigation Operations (FONOPs) remain legally and diplomatically indispensable, mere 'transits' are increasingly insufficient in terms of strategic efficacy when confronting China's incremental, 'salami-slicing' expansionism.

Prospects

The Asia-Pacific's large multilateral mechanisms, including the ARF, ADMM-Plus and the East Asia Summit, have underperformed on concrete disputes. Discussions pointed instead to a three-part formula of **alliance**, **self-reliance** and **alignment**, with the last pursued through minilateral groupings such as Japan–Philippines–Australia and US–Japan–Korea. Taiwan, though excluded from most formal frameworks, can contribute through its growing coast guard cooperation with the Philippines, its experience prosecuting cable sabotage, and its asymmetric and uncrewed-systems know-how. Japan's emphasis that "production capacity is deterrence" and its use of automation to offset demographic decline resonate with Taiwan's own manpower and sustainment challenges.

Policy Implications and Recommendations

The analysis and discussions point to the following considerations for Taiwan and partners.

- **Adopt a graduated response framework.** Define tiers of grey-zone activity and pair firm enforcement with visible restraint to avoid both under-reaction and unnecessary escalation.
- **Institutionalise operational-level crisis management.** Develop joint Navy–Coast Guard–civil agency standard operating procedures and rules of engagement for collisions, boarding attempts, water-cannon use and electronic interference. Hotlines should connect the people who meet at sea and be exercised regularly, since untested channels have limited value.
- **Build a common operational picture.** Start with the Philippines, then add Japan and the United States, sharing non-military data first: vessel identity and behaviour, proximity to cables and survey activity. The Singapore Information Fusion Centre offers a workable model for trust-based sharing.
- **Make undersea infrastructure resilient.** Expand cable redundancy, burial and landing-point diversity, accelerate satellite backup for outlying islands, and set evidence standards that allow prosecution of sabotage. Propose a regional protocol for sharing information on suspect vessels.
- **Strengthen energy and SLOC security.** Extend energy reserves, diversify supply, and consult Northeast Asian importers who share exposure to the Bashi Channel and Miyako Strait.
- **Expand coast guard and minilateral cooperation.** Deepen training, joint exercises and capacity support with the Philippines, Japan, Korea, India and the United States, and use Track 1.5 and Track 2 channels to keep Taiwan involved where formal participation is not possible. Explore co-development and surge production of low-cost uncrewed systems with partners.
- **Combine alliance reliability with self-reliance.** Maintain close defence ties with the United States while investing in asymmetric capabilities and sustainment. Begin contingency dialogue with Southeast Asian governments on matters such as evacuation of their nationals, which affects their stake in Strait stability.

Furthermore, European partners, including Germany, should be encouraged to reinforce their commitment to freedom of navigation operations and the peaceful settlement of disputes in accordance with UNCLOS, thereby bridging Euro-Atlantic and Indo-Pacific maritime security.

Maritime security in the Indo-Pacific will not be decided only by who has the larger navy, but by who can maintain presence, detect coercion, protect critical infrastructure, coordinate with partners and control escalation. The goal should be neither passive accommodation nor uncontrolled escalation, but a posture that is present, capable, coordinated and predictable.

Notes

1 The Philippine Department of National Defense uses “ICAD” (illegal, coercive, aggressive and deceptive activities) for such conduct; see “Points of Convergence” for a discussion of why the “grey zone” label is considered too broad.

2 Taipei Times (2026): Coast guard expels two Chinese boats from Taiwan-controlled waters, 2 October 2026, https://www.taipeitimes.com/News/taiwan/archives/2026/10/02/2003865288.

3 Discussions took place at the Pacific Forum and the East-West Center in Honolulu. Points are summarised from meeting notes and individual remarks are not attributed.

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Japan's Indo-Pacific Maritime Security: Deterrence and Cooperation Within and Across Regions

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Key Takeaways

Japan: Prioritise deterrence around Japan's southwestern islands and Taiwan, protect vital sea routes, and build forces able to survive attack and sustain operations.

Japan–US alliance: Link SHIELD's coastal defence to US maritime operations through joint planning. Develop tactical AI satellite capabilities and resilient space systems for combined maritime operations, and verify that their data and communications can be used effectively by both forces.

Regional partners: Strengthen Japan–South Korea and Japan–US–South Korea cooperation on ISR and logistics. Expand MDA cooperation with South Korea, Australia and India and through the Quad. Support Southeast Asian partners' chosen missions.

Europe: Stronger European defence against Russia can ease competing demands on US forces in an Indo-Pacific crisis. Cooperation on space, maritime awareness and drones can strengthen defence in both regions and help Southeast Asian partners sustain their missions.

Japanese Security Priorities and Maritime Deterrence

Security Challenges and Lessons from Recent Wars

Japan's first maritime priority is to deter coercion and aggression in the western Pacific, especially around its southwestern islands and Taiwan. China's expanding operations east of Japan and pressure on Taiwan could threaten Japanese territory, disrupt allied operations and interrupt commercial shipping. North Korean missiles, Russian military activity and closer coordination among China, Russia and North Korea compound these pressures. Stronger national capabilities and cooperation within and beyond the Indo-Pacific should reinforce deterrence while preserving the maritime access on which Japan depends.

Recent wars show why endurance matters, but Japan must adapt their lessons to its geography. The war in Ukraine highlights the contribution of unmanned systems, counter-drone defences and sustained replenishment, while conflicts in the Middle East expose vulnerabilities in shipping and energy supplies. Japan's dispersed islands and long sea crossings impose different requirements for range, communications and resupply. Distance and weather can limit drone endurance and increase support requirements. Japan must draw on foreign experience to develop operational concepts for AI and unmanned systems suited to its geography and defence needs.

Deterrence by Denial and Maritime Access

Deterrence by denial requires convincing an adversary that aggression will fail. Japan needs forces that can survive initial attacks, prevent an adversary from seizing and holding territory, and sustain resistance as a conflict lengthens. The ability to prevent rapid territorial gains and sustain organised resistance would reduce an adversary's confidence in a quick, lasting victory. This resistance buys time for US reinforcements to reach Japan and for diplomacy. Investment in missiles and platforms must be accompanied by spending on the personnel, munitions, repair capacity and resilient information systems needed to keep forces effective under attack. Recovery and replenishment must therefore form part of Japan's deterrent posture.

Sea denial alone cannot protect Japan's commercial lifelines or ensure the movement of US reinforcements. Japan needs sufficient sea control, where and when required, to safeguard shipping and support allied movements. Cooperation with coastal partners can help safeguard maritime activity along routes linking the Persian Gulf, Strait of Malacca and South China Sea. Ships leaving the Gulf must pass through the Strait of Hormuz, making reserves and diverse supply sources essential.

SHIELD and Coastal Defence

Japan's Synchronized, Hybrid, Integrated and Enhanced Littoral Defense (SHIELD) concept could strengthen coastal defence by combining aerial, surface and underwater unmanned systems with crewed forces and stand-off capabilities.[1] Distributing tasks across these forces could make the defence less vulnerable to attacks on a few platforms or facilities. Counter-drone defences must also protect the sensors, communications nodes and support infrastructure that keep these forces operational. Together, these capabilities should enable Japan to sustain resistance even as losses mount.

AI and unmanned systems can make trained personnel more effective, but operating, maintaining and replenishing these systems still require skilled people. Dispersed forces need reliable surveillance and communications to contribute to a common defence. These needs link SHIELD to Japan's investment in space capabilities.

Tactical AI Satellites and Resilient Space Systems

Effective anti-ship operations require timely information about moving vessels. Japan's tactical AI satellite demonstration programme aims to integrate data from multiple satellites using onboard processing and enable two-way communications with stand-off missiles and other equipment.[2] These functions could

support the information processing and communications needed along the anti-ship kill chain, from detection to engagement.

Space systems, communications links and ground facilities must remain operational under attack. Onboard processing and optical intersatellite links could reduce dependence on individual ground stations, but dispersed facilities and recovery capacity are still necessary. The FY2027 budget request proposes a demonstration of protective satellite manoeuvres, using technologies that could underpin future bodyguard satellites.[3] Space domain awareness (SDA) can help operators identify threats to satellites and take protective measures, supporting more resilient space-based intelligence, surveillance and reconnaissance (ISR) and satellite communications.

Deterrence and Cooperation in the Indo-Pacific

Strengthening the Japan–US Alliance

Japan's conventional defence and US extended deterrence should reinforce one another. SHIELD could help sustain resistance if competing demands delay US reinforcements. By defending islands and chokepoints, it could constrain Chinese naval movements and complement wider US maritime operations. Joint planning should link these missions through shared targeting information and coordinated engagements.

US forces should also be able to draw on Japanese surveillance, data processing and communications in maritime operations. Tactical AI satellites could support both countries' anti-ship operations if their performance and interoperability are demonstrated. Joint experiments should assess whether these capabilities help forces sustain missions, recover from losses and prevent an adversary from consolidating territorial gains.

Regional Partners and Minilateral Cooperation

Cooperation with South Korea should strengthen deterrence on the peninsula and protect shared maritime interests. North Korea remains Seoul's immediate security challenge. South Korea's ability to meet its core defence responsibilities during a wider crisis would benefit Japan and ease pressure on allied forces. The two countries should strengthen bilateral ISR and logistics cooperation to support operations during crises, alongside trilateral cooperation with the United States. Protecting sea routes need not entail identical roles in a Taiwan contingency.

Coast guard assistance and maritime domain awareness (MDA) cooperation should reflect Southeast Asian partners' operational priorities. Japan should deepen MDA cooperation with South Korea, Australia and India, as well as through the Quad's Indo-Pacific Partnership for Maritime Domain Awareness (IPMDA). Shipbuilders and repair yards in Japan and South Korea could support maintenance and spare parts supply, complemented by relevant training provided by naval and coast guard organisations. Keeping partners' vessels operational would sustain their complementary contributions to maritime law enforcement, defence and the protection of essential sea routes.

Reflections from the Dialogue in Honolulu

The Honolulu discussions raised questions about whether US defence cooperation with NATO allies remained as robust as US cooperation in the Indo-Pacific. Another assessment emphasised that, despite political concerns, day-to-day military cooperation between the United States and its European allies largely continued. For policy, these differing assessments highlight the need to distinguish political willingness from available military capacity. Even if Washington is willing to help, simultaneous crises could strain US intelligence, missile interceptors and logistics.

Japan and European countries should shoulder greater responsibility for their own defence. Stronger European defence against Russia in the Euro-Atlantic could ease competing demands on US forces during an Indo-Pacific crisis. The effect would depend on whether European forces could sustain relevant missions with less reliance on US capabilities needed in both regions.

European naval deployments drew mixed assessments. They can signal commitment and complicate Chinese planning, but sustained operations depend on force availability and rotations. European commitments framed around shared principles carry greater weight with Southeast Asian partners when accompanied by practical support for their own maritime priorities, including resistance to coercion and continued maritime access.

Views differed over whether engagement with China encouraged restraint or risked accommodating coercion. Such approaches should be judged by whether they restrain coercion and preserve maritime access and freedom of action. States weigh maritime access, economic ties and escalation risks differently. Closer defence ties with the Philippines could strengthen resistance to coercion, while some other partners stress maritime law and freedom of navigation without taking sides on competing claims.

These differences also shape understandings of strategic autonomy, which vary within the Indo-Pacific as within the Euro-Atlantic. Some European approaches emphasise reducing dependence on the United States and strengthening independent action. In the Indo-Pacific, alliances with the United States and diverse partnerships can expand strategic options, while hedging against major-power pressure or excessive dependence can preserve freedom of action. In Southeast Asia, choices reflect each state's security priorities, economic ties, domestic politics, interagency arrangements and assessment of major-power pressure. Cooperation should expand partners' practical options while allowing them to determine their own roles in regional security.

Interregional Cooperation: Policy Implications and Recommendations

Investing in Sustained Defence

Japan should set investment priorities by identifying what most limits its ability to deny an attack and sustain essential maritime operations. Where dispersed forces have sufficient weapons but lack timely target information, additional surveillance and communications may provide greater operational value than further weapons purchases. Where forces can engage effectively but cannot sustain resistance, munitions, repair capacity and replenishment should take priority. Sustained operations using SHIELD and tactical AI satellites will require trained personnel, adequate stocks, repair capacity and resilient communications. Japan and the United States should assess whether these investments enable their forces to withstand attacks and recover during a prolonged crisis. Joint scenario exercises should identify competing demands across regions for intelligence, interceptors and logistics, helping to establish operational requirements and investment priorities. Cooperation with other partners should likewise address their defence needs as security demands intensify.

Space Cooperation across Regions

Space cooperation can strengthen Japanese and European defence even when both sides must concentrate their forces closer to home. Combining commercial Earth-observation data could improve MDA and ISR, while sharing SDA information could help operators identify threats to satellites and take protective measures. Japan should assess whether the onboard processing and communications envisaged for tactical AI satellites could support European maritime security, drawing on lessons from the demonstration programme. Operational applications would depend on coverage, connectivity and interoperability tailored to the missions involved.

Japan and Europe should clarify data access, release permissions and recovery arrangements before a crisis. Practical trials should establish whether information reaches operational users in time and remains usable when communications or ground facilities are disrupted. Complementary sensors and geographically dispersed facilities could extend coverage and provide alternatives if individual systems become unavailable. More dependable ISR and communications could help each side deny an aggressor its objectives. Cooperation across regions could therefore strengthen deterrence within each region.

Satellite and drone observations could also help Southeast Asian partners maintain MDA and sustain their chosen coast guard missions. Partner operators should help define surveillance tasks, access to information and maintenance requirements. Japan and Europe should develop this cooperation while improving their own defence information systems, so that it serves the operational needs of all partners.

Coastal Defence and Unmanned Systems Cooperation

Coastal defence and sea denial provide a practical basis for Japan–Europe cooperation on unmanned systems and engagement with interested Southeast Asian coastal states. Despite geographic differences, Japan and European partners face common challenges integrating drones while protecting forces and infrastructure from low-altitude threats. The air littoral—the contested low-altitude environment where air and surface operations interact—offers a useful lens connecting European experience in land and coastal operations with Japan's island defence requirements. Joint experimentation should explore how aerial drones and counter-drone defences work alongside ground and maritime forces and unmanned surface and underwater systems to support coastal defence and sea denial.

Cooperation on unmanned systems should link production to the development of operational concepts and doctrine. Joint experiments, scenario analysis and tabletop exercises should assess whether forces can maintain ISR and deny an adversary its objectives despite disrupted communications or the loss of individual platforms. These activities should identify which methods transfer across theatres and which require adaptation to distance, terrain, weather and resupply. Where coastal defence and sea denial requirements overlap, producing compatible unmanned systems and interchangeable components in both regions could provide alternative wartime supplies and help replace losses if production in either region were disrupted, provided capacity remained available during simultaneous crises. Common standards, compatibility testing, access to technical data, export approvals and resilient delivery routes would be needed to ensure usable wartime supplies.

Japan and Europe should work with interested Southeast Asian coastal states to explore how cooperation on unmanned systems—from joint experimentation and the development of operational concepts and doctrine to development and production—could support their coastal defence and sea-denial capabilities. Such cooperation should reflect each partner's geography, resources and security priorities.

Conclusion

Japan's maritime security depends on deterring coercion and aggression in the western Pacific while protecting the sea routes that sustain its economy and defence. Both require resilient forces able to deny an aggressor's objectives and partners able to sustain complementary missions. Stronger European defence can ease competing demands on US forces. Japan–Europe space and drone cooperation can strengthen capabilities in both regions. Cooperation should reflect partners' security priorities and views of strategic autonomy while upholding the rules that sustain international trade and maritime security.

Notes

1 Japan Ministry of Defense, Overview of the FY2027 Budget Request, https://www.mod.go.jp/j/budget/yosan_gaiyo/fy2027/yosan_20260831.pdf.
2 Japan Ministry of Defense (2026), as in note 1.
3 Japan Ministry of Defense (2026), as in note 1.