



# Delhi Policy Group

Advancing India's Rise as a Leading Power



## INDO-PACIFIC MONITOR

MAY 2026

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**Delhi Policy Group**

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### ABOUT US

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### INDO-PACIFIC MONITOR

This publication is a monthly analytical survey of developments and policy trends that impact India's interests and define its challenges across the extended Indo-Pacific maritime space, which has become the primary theatre of global geopolitical contestation. It is authored by Cmde. Lalit Kapur (Retd.), DPG Senior Fellow for Maritime Strategy, assisted by Ms. Divya Rai, Research Associate, based on open source reports and publications. Your comments and feedback may be addressed to the author at [lalit@dpg.org.in](mailto:lalit@dpg.org.in). To subscribe, please [click here](#).

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### Cover Images:

1. Prime Minister Narendra Modi meets Vietnam President To Lam at Hyderabad House, New Delhi on May 06, 2026. Source: PIB
2. US President Donald Trump and Chinese President Xi Jinping visit the Temple of Heaven, Beijing, May 14, 2026. Source: MOFA China
3. US Secretary of State Marco Rubio and India's External Affairs Minister Dr. S. Jaishankar at Joint Press Conference in New Delhi on May 24, 2026. Source: US State Department

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# INDO-PACIFIC MONITOR

May 2026

## Abstract

The US-Iran confrontation in the Gulf remained stalemated, with the indefinite ceasefire announced on April 21 still in place. Iran launched the Persian Gulf Strait Authority on May 18, putting in place a system for charging tolls from authorised users of the Hormuz Strait. The US continued blockading Iran's ports. Reports from the US indicated that an interim deal and extension of the ceasefire by 60 days was imminent, while those from Iran insisted that frozen funds be released before any deal and nuclear issues had not been discussed.

US President Donald Trump visited China from May 13-15, claiming some trade and market access deals, but with little to show on pressing global and Indo-Pacific issues. The change in the US approach towards China from confrontation to conciliation and accommodation was evident.

Russia's President Vladimir Putin visited Beijing for the 25<sup>th</sup> time on May 19-20, focusing on strategic coordination, energy, security architecture and geopolitical alignment, and further strengthening the China-Russia strategic partnership.

Prime Minister Narendra Modi's international engagements during the month included hosting of incoming visits by the leaders of Vietnam from May 05-07 and Cyprus from May 20-23, as well as a five-nation tour to the UAE, Netherlands, Sweden, Norway and Italy from May 15-20. India upgraded its strategic partnerships with these countries. Norway and the Netherlands agreed to join India's Indo-Pacific Oceans Initiative.

US Secretary of State Marco Rubio made his maiden visit to India from May 23-26, seeking to stabilise the bilateral relationship and participating in the 11<sup>th</sup> Quad Foreign Ministers' Meeting. The visit provided a reaffirmation of changed US foreign policy considerations that will shape India's bilateral relationship with the US in the coming years.

Japan's Prime Minister Sanae Takaichi visited Vietnam and Australia from May 01-05 and South Korea on May 19, while hosting Philippines President Ferdinand Marcos from May 26-29, to strengthen bilateral relations with these countries in pursuit of her new FOIP strategy. Japan's Defence Minister Shinjiro Koizumi visited Indonesia and the Philippines from May 03-06 to strengthen bilateral defence relations, while Japan's

Foreign Minister Toshimitsu Motegi delivered a policy speech on shaping Japan-Africa relations through the FOIP strategy in Kenya on May 03.

India's Defence Minister Shri Rajnath Singh undertook visits to Vietnam and South Korea from May 18-21 to strengthen the defence component of India's Act East Policy, deepen strategic military cooperation, boost defence industrial partnerships and enhance maritime collaboration to promote peace and stability in the Indo-Pacific.

US Secretary of War Pete Hegseth delivered a blunt address at the Shangri-La Dialogue on May 30, highlighting US concern regarding China's military buildup and the intent to build a strong denial defence in the Pacific. He demanded that allies share the burden by spending at least 3.5% of their GDP on defence. Drawing attention to India's actions to carry its share of the burden in the Indian Ocean, he highlighted advancements in India-US defence cooperation.

South Korea announced its plan to build nuclear attack submarines indigenously on May 26, with the first submarine projected to enter service in the late 2030s.

China intensified pressure on Japan over Prime Minister Takaichi's remarks on Taiwan by cutting rare earth exports to the country.

Italy's parliament approved the donation of the retired aircraft carrier Giuseppe Garibaldi to Indonesia, to become effective by the end of this year, while pursuing the sale of submarines and aircraft worth €1.5 billion to that country.

IOS Sagar returned to Kochi on May 20 on completion of its deployment to Southeast and South Asia with personnel from 16 IOR nations embarked.

## The Trump Visit to Beijing

On October 30, 2025, on the sidelines of the APEC Economic Leaders' Meeting at Busan, US President Donald Trump and China's President Xi Jinping called a truce in the ongoing tariff war and China's stoppage of rare earth exports. They committed to reciprocal visits to each other's country, with Trump to visit Beijing in April 2026, and Xi to visit the US later in the year. The April meeting was postponed on account of the US preoccupation with its war in Iran. Trump flew to Beijing from May 13-15 for the first US Presidential visit to China since he himself had gone there in November 2017.

Trump was received at Beijing by the Chinese Vice President Han Zheng and US Ambassador to China David Perdue, among others. The official welcome ceremony including a Guard of Honour took place on May 14, followed by bilateral delegation level talks. The leaders then visited the Temple of Heaven. A banquet at the Great Hall of the People followed. On May 15, Trump was hosted by Xi at the Zhongnanhai leadership compound, where China's top leadership lives and works, for a final meeting followed by a working lunch. He departed Beijing for Washington on the afternoon of May 15.

Perhaps the most significant change in the bilateral relationship between 2017 and now is the US stance towards China. Trump built his first term persona by being seen as tough on China. He criticised China for being an economic predator, indulging in intellectual property theft and mercantilism, and being a strategic competitor intent on displacing US power from East Asia. He was instrumental in changing the US outlook towards China. This included blaming China for the Covid-19 pandemic, while building a personal rapport with President Xi through copious flattery and seeking to reshape China's economic model through economic and regulatory pressure.

In 2026, China is seen as a peer of the US, able to stymie regulatory and tariff pressures through its own leverages, particularly in critical minerals and rare earths. Trump was conscious of his weaker position. China's economic model, including its use of unfair trade practices such as intellectual property theft, forced transfers of technology, use of subsidies and forced labour no longer figured in his rhetoric. The flattery was still present, but now appeared deferential, the focus being managing superpower rivalry. Both nations prioritised strategic stability, economic resilience and measures to prevent conflict. China's readout of the summit emphasises "a new vision of building a constructive China-US relationship of strategic stability" to provide strategic guidance for China-US relations over the next three years and beyond", encompassing positive stability with cooperation as the mainstay, healthy

stability with competition within proper limits, constant stability with manageable differences, and lasting stability with expectable peace”<sup>1</sup>. The White House fact sheet speaks of agreement that the US and China should “build a constructive relationship of strategic stability on the basis of fairness and reciprocity”<sup>2</sup>. The evidence indicates that the US has moved towards a conciliatory and accommodative approach towards China and a bi-polar world, an assessment that will impact the security calculus of US allies and partners in the Indo-Pacific (particularly Japan, the Philippines and Australia) and Europe.

Taiwan was one of the key topics of discussion, even though it does not find mention in the US fact sheet. President Xi clearly laid down China’s red line, describing Taiwan as the most important issue in US China relations. If handled properly the two countries would enjoy overall stability. If not, there would be clashes and even conflict, jeopardising the entire relationship. Xi said Taiwan independence and cross Strait peace were irreconcilable.

During his first term, Trump had been strongly supportive of Taiwan, shifting from decades of diplomatic ambiguity. He accepted a congratulatory phone call from Taiwan’s President, breaking with established protocol. His administration approved over \$18 billion in arms sales, sent high-level delegations to Taiwan, and lifted restrictions on interaction between US diplomats and Taiwanese officials. The changed outlook in the present summit is evident. Trump was receptive towards Xi’s concerns and publicly warned Taiwan against declaring independence (Taiwan in turn responded that it was already independent). He questioned the rationale for defending Taiwan in a conflict, observing that US forces would have to travel 9,500 miles to fight a war. He discussed Xi’s opposition to the approved \$11 billion arms sale package for Taiwan, as well as the pending \$14 billion package, describing them as a negotiating chip and saying he would make a final determination shortly, thus contravening Reagan’s six assurances to Taiwan. The change, signalling a wavering commitment, will be noted in Taiwan, as well as in Japan and other East Asian nations.

The US fact sheet says that both leaders agreed that Iran cannot have nuclear weapons, called for reopening the Strait of Hormuz and agreed that no country or organisation can be allowed to charge tolls. Trump also said Xi had reassured him that China would not supply military equipment to Taiwan. China’s readout does not confirm these words, limiting itself to saying that the two leaders exchanged views on the Middle East situation. Its foreign ministry spokesperson, however, said there was no

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<sup>1</sup> President Xi Holds Talks with US President Donald J Trump, May 14, 2026, [https://www.fmprc.gov.cn/mfa\\_eng/xw/zyxw/202605/t20260514\\_11910330.html](https://www.fmprc.gov.cn/mfa_eng/xw/zyxw/202605/t20260514_11910330.html)

<sup>2</sup> Fact Sheet: President Donald J. Trump Secures Historic Deals with China, Delivering for American Workers, Farmers, and Industry, May 17, 2026, <https://www.whitehouse.gov/fact-sheets/2026/05/fact-sheet-president-donald-j-trump-secures-historic-deals-with-china-delivering-for-american-workers-farmers-and-industry/>

point in continuing with this (the Iran) conflict which should not have happened in the first place<sup>3</sup>. It was now important to reach a settlement on the Iranian nuclear issue accommodating the concerns of all parties, and to reopen shipping lanes as soon as possible to respond to the call of the international community.

The US fact sheet claims that both leaders confirmed their shared goal of denuclearising North Korea. China's readout limits itself to saying that the two Presidents exchanged views on the Korean Peninsula.

The US fact sheet claims that China will address US concerns regarding supply chain shortages related to rare earths and other critical minerals, including yttrium, scandium, neodymium and indium, as well as regarding prohibitions or restrictions on the sale of rare earth production and processing equipment and technology. There is no mention of this in the Chinese readout. There is no indication that the export control regime implemented by China in April 2025 in response to US tariffs will be rolled back.

The US fact sheet claims that China has approved the initial purchase of 200 Boeing aircraft, as well as \$17 billion of US agricultural products annually for the next three years. China's readout does not confirm these deals. It does, however, note that China-US economic and trade ties are mutually beneficial and win-win in nature and that where disagreements exist, consultation on an equal footing is the only right choice. The US announcements will not lead to a significant rebalancing of trade – China's overall global trade surplus in 2025 was a record \$ 1.19 trillion, while its surplus with the US is about \$16.8 billion per month.

The US approved licences for China to purchase up to 750,000 Nvidia H200 chips. Sale of the Blackwell and Hopper chips, however, remains banned. China did not permit domestic companies to complete the purchase, choosing to develop its own AI technology and avoid deepening dependencies on foreign supply chains.

A number of other bilateral issues did not apparently come up for discussion. These include US tariffs and the trade truce, China's trade surplus, industrial subsidies and currency valuation, AI governance and data governance, the South China Sea and Freedom of Navigation, democracy, human rights and Chinese repression in Xinjiang, Tibet and Hong Kong, China's military and nuclear expansion, and China's illicit surveillance and espionage, to name a few.

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<sup>3</sup> Foreign Ministry Spokesperson's Remarks on the Iran Situation, May 15, 2026, [https://www.fmprc.gov.cn/eng/xw/fyrbt/202605/t20260515\\_11910982.html](https://www.fmprc.gov.cn/eng/xw/fyrbt/202605/t20260515_11910982.html)

In sum, the summit appears to have been long on optics and rhetoric, but short on substance and without any significant policy breakthroughs. Trump's focus seems to have been trade and market access with him claiming some great deals, but without confirmation from China. China's focus, on the other hand, was establishing itself as a peer and ensuring strategic stability for the rest of Trump's presidency, and in this it appears to have been successful. The inescapable conclusion is that China's position has become stronger, while that of the US has weakened. How the relationship develops further will become clearer when Xi Jinping pays his return visit to the US in September 2026.

## Marco Rubio's First Visit to India

US Secretary of State Marco Rubio made his first visit to India from May 23-26, seeking to apply salve to deep wounds inflicted on the bilateral relationship over the course of the last one year. His engagement included meetings at the highest levels in the land and plenty of optics, but questions regarding the credibility of the US as a partner remain.

India had welcomed the election of Donald Trump as President and Prime Minister Modi was among the first world leaders to meet him in February 2025<sup>4</sup>. The two leaders formulated the blueprint for the near and mid-term future of the bilateral relationship<sup>5</sup>. At least five differences since then have cast their shadow on India-US relations. For most of this period, the US had no Ambassador in India; Sergio Gor presented his credentials only on January 14, 2026.

Relations started souring after the May 2025 Trump claim of having mediated successful termination of hostilities between India and Pakistan following Operation Sindoor, using threats of cutting access to the US market. India has a longstanding national position that issues pertaining to J&K must be dealt with by India and Pakistan bilaterally. This position was reiterated by the MEA spokesperson<sup>6</sup>. When Trump continued repeating his claim and embarrassing Modi politically, India formally stated that the issue was never discussed between the leaders<sup>7</sup>. Pakistan, on the other hand, nominated Trump for the Nobel Peace Prize for his role in mediating

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<sup>4</sup> For an overview, see Lalit Kapur, "Prime Minister Modi Meets President Donald Trump", Indo-Pacific Monitor Volume VI Issue 2, February 2025, [https://www.delhipolicygroup.org/storage/uploads/publications\\_file/indo-pacific-monitor-5276.pdf](https://www.delhipolicygroup.org/storage/uploads/publications_file/indo-pacific-monitor-5276.pdf)

<sup>5</sup> India-US Joint Statement during the visit of Prime Minister of India to the US, February 14, 2025, <https://pib.gov.in/PressReleasePage.aspx?PRID=2103037>

<sup>6</sup> Transcript of weekly media briefing by the Official Spokesperson, May 13, 2025, <https://www.mea.gov.in/media-briefings.htm?dtl/39495/Transcript+of+Weekly+Media+Briefing+by+the+Official+Spokesperson+May+13+2025>

<sup>7</sup> English Translation of Foreign Secretary's statement on the telephone conversation between PM and US President (June 17, 2025), June 18, 2025, <https://www.mea.gov.in/Speeches-Statements.htm?dtl/39692/English+Translation+of+Foreign+Secretarys+statement+on+the+telephone+conversati+on+between+PM+and+US+President+June+17+2025>

the conflict with India. The second was the US hyphenating India with Pakistan again, breaking protocol by receiving Army Chief Field Marshal Asim Munir at the White House on June 18, 2025, and later concluding a deal to integrate a Trump entity's crypto business (World Liberty Financial) into Pakistan's cross-border and digital payments framework. The third was Trump's imposition of punitive tariffs on India – initially at 25% on August 01, 2025, in line with his imposition of tariffs on allies and partners alike, and then an additional 25% (raising the total to 50%) on August 27, 2025, ostensibly for purchase of Russian oil (notably, China which purchased a larger quantity of Russian oil, was not targeted). Trump went on to label India as a 'tariff king'. Fourth, towards the end of 2025, the US succumbed to Chinese leverage on exports of rare earths and critical minerals and turned towards conciliation, reversing the prevailing paradigm of great power competition. The US National Security Strategy of November 2025 prioritised the Western Hemisphere over the Indo-Pacific, while Trump reiterated his conviction that China would not move against Taiwan during his presidency, based on assurances by China's President Xi Jinping. The action impacted US approach towards its Indo-Pacific partners. Finally, the failed US war on Iran launched on February 28, 2026 resulted in the closure of the Strait of Hormuz, severely damaging India's economy.

Rubio's visit followed those of the American Deputy Secretary of State, Chris Landau<sup>8</sup>, for the Raisina Dialogue in March 2025 and the subsequent visit of the US Under Secretary of War for Policy Elbridge Colby later the same month<sup>9</sup>. His objective was to stabilise relations after a prolonged period of tension and demonstrate the US commitment to India as a strategic partner. Speeches by Landau and Colby had earlier indicated that the US wanted to partner with India, but its approach had changed. Landau made clear that India should understand that the US would not repeat the mistake it made 20 years ago with China leading to India taking over US markets<sup>10</sup>. He also said that any trade deal must favour American workers and interests, and pitched for the US as an energy source for India. Colby explicitly stated that Indo-Pacific security should not be based on "naivete or gauzy abstractions like the rules-based international order", frustrating Indian strategic thinkers who rely on this order to counter Chinese expansionism in the region, and redefined the bilateral relationship as one based solely on "hard-headed, clear-eyed recognition of overlapping interests"

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<sup>8</sup> Deputy Secretary of State Christopher Landau at the Raisina Dialogue, March 5, 2026, <https://www.state.gov/releases/office-of-the-spokesperson/2026/03/deputy-secretary-of-state-christopher-landau-at-the-raisina-dialogue>

<sup>9</sup> Readout of Under Secretary of War for Policy Elbridge Colby's Visit to India, March 26, 2026, <https://www.war.gov/News/Releases/Release/Article/4445171/readout-of-under-secretary-of-war-for-policy-elbridge-colbys-visit-to-india/>

<sup>10</sup> Deputy Secretary of State Christopher Landau at the Raisina Dialogue, March 5, 2026, <https://www.state.gov/releases/office-of-the-spokesperson/2026/03/deputy-secretary-of-state-christopher-landau-at-the-raisina-dialogue/>

rather than shared democratic values or long-term diplomatic formalities<sup>11</sup>. The changed paradigm governing US-India relations had become clear.

Rubio's itinerary commenced on May 23 with a visit to the late Mother Teresa's Missionaries of Charity in Kolkata. He then met Prime Minister Modi<sup>12</sup>, inaugurated a building in the US Embassy at New Delhi<sup>13</sup> and attended a reception at the US Embassy<sup>14</sup>. On May 24, he met EAM Dr. S. Jaishankar<sup>15</sup> and NSA Ajit Doval, and attended to US 250<sup>th</sup> Independence Day reception at the US Embassy<sup>16</sup>. On May 25, he visited the Taj Mahal in Agra and Jaipur's Amber Fort, while his last day was spent in the 11<sup>th</sup> Quad Foreign Ministers' Meeting in New Delhi<sup>17</sup>. In between there were official interviews with three journalists from CNN-News18, India Today and NDTV.

In his meetings with India's leaders, Rubio stressed cooperation on trade, energy, defense, and maritime security. He described India as one of Washington's most important strategic partners and emphasised that India and the US remained strategically aligned. He expressed optimism about finalising a bilateral trade deal soon and conveyed an invitation from President Donald Trump for Modi to visit Washington later this year. He stressed that US energy could help diversify India's energy supply and stated that the United States would not allow Iran to manipulate the global energy market.

Differences in the US and Indian readouts of Rubio's meeting with Prime Minister Modi highlight the difference perspectives of the two sides. The US readout<sup>18</sup> explicitly mentions the strategic importance of the India-US partnership, highlighting

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<sup>11</sup> Remarks by Under Secretary of War for Policy Elbridge Colby at the Ananta Centre in India (As Prepared), March 24, 2026, <https://www.war.gov/News/Speeches/Speech/Article/4442027/remarks-by-under-secretary-of-war-for-policy-elbridge-colby-at-the-ananta-centr/>

<sup>12</sup> Secretary Rubio's Meeting with Indian Prime Minister Narendra Modi, May 23, 2026, <https://www.state.gov/releases/office-of-the-spokesperson/2026/05/secretary-rubios-meeting-with-indian-prime-minister-narendra-modi/>

<sup>13</sup> Secretary of State Marco Rubio and US Ambassador Sergio Gor at a US Embassy Support Annex Dedication Ceremony, May 23, 2026, <https://www.state.gov/releases/office-of-the-spokesperson/2026/05/secretary-of-state-marco-rubio-and-u-s-ambassador-sergio-gor-at-a-u-s-embassy-support-annex-dedication-ceremony/>

<sup>14</sup> Secretary of State Marco Rubio and US Ambassador Sergio Gor arriving at a Roosevelt House Reception, May 23, 2026, <https://www.state.gov/releases/office-of-the-spokesperson/2026/05/secretary-of-state-marco-rubio-and-u-s-ambassador-sergio-gor-arriving-at-a-roosevelt-house-reception/>

<sup>15</sup> Secretary of State Marco Rubio with Indian External Affairs Minister Dr. Subrahmanyam Jaishankar, May 24, 2026, <https://www.state.gov/releases/office-of-the-spokesperson/2026/05/secretary-of-state-marco-rubio-with-indian-external-affairs-minister-dr-subrahmanyam-jaishankar/>

<sup>16</sup> President Donald J Trump, Secretary of State Marco Rubio, Indian External Affairs Minister Dr. Subrahmanyam Jaishankar and US Ambassador to India Sergio Gor at Freedom 250: Independence Day Reception, May 24, 2026, <https://www.state.gov/releases/office-of-the-spokesperson/2026/05/president-donald-j-trump-secretary-of-state-marco-rubio-indian-external-affairs-minister-subrahmanyam-jaishankar-and-u-s-ambassador-to-india-sergio-gor-at-freedom-250-independence-day-reception/>

<sup>17</sup> This will be covered in a separate policy brief.

<sup>18</sup> Secretary Rubio's Meeting with Indian Prime Minister Narendra Modi, May 23, 2026, <https://www.state.gov/releases/office-of-the-spokesperson/2026/05/secretary-rubios-meeting-with-indian-prime-minister-narendra-modi/>

shared democratic values, profound economic and commercial opportunity and strong personal ties between President Trump and Prime Minister Modi. It specifies that Rubio extended an invitation from Trump to Modi to visit the White House. On the Middle East, it states that the US will not let Iran hold the global energy market hostage and affirms that US energy products can diversify India's energy supply. It mentions "Mission 500", the objective of doubling bilateral trade by 2030, and states that the Prime Minister agreed to deepen trade and defence cooperation, as well as to accelerate collaboration on critical and emerging technologies. India's readout is more guarded<sup>19</sup>, merely mentioning that the Secretary of State briefed the PM on progress in bilateral cooperation across a wide range of sectors, including defence, strategic technologies, trade and investment, energy security, connectivity, education and people-to-people ties; and that Rubio shared the US perspective on regional and global issues, including the situation in West Asia. It makes no mention of the invitation, or of energy purchases from the US. It calls for the peaceful resolution of conflicts through dialogue and diplomacy, subtly highlighting that the US action in Iran is against global norms.

Similar subtle differences were visible in the interactions of Secretary Rubio and EAM Jaishankar with the press<sup>20</sup>. The EAM spoke of the recent renewal of the 10-year major defence partnership framework as well as signing of a comprehensive agreement on Underwater Domain Awareness. He highlighted the importance of early conclusion of the final text of the interim agreement on reciprocal and mutually beneficial trade. He welcomed expansion of bilateral energy trade, noting that diversified supplies are at the heart of energy security for India. He highlighted nuclear cooperation – India seeks expansion of its nuclear generation capacity from the current 8.88 GW to at least 100 GW by 2047, while the US plans to quadruple its nuclear power generation by 2050. He mentioned cooperation in critical minerals and in AI, and said he had apprised Secretary Rubio of the challenges faced by legitimate travellers in visa issuance. He made five points: India advocates dialogue and diplomacy to address conflicts; it supports safe and unimpeded maritime commerce; it demands scrupulous respect for international law; it is against weaponisation of market shares and resources; and it believes in the value of trusted partnerships and resilient supply chains to de-risk the global economy (notably, the US has infringed all five points during the last one year).

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<sup>19</sup> US Secretary of State calls on Prime Minister Shri Narendra Modi, May 23, 2026, <https://www.mea.gov.in/press-releases.htm?dtl/41225/US+Secretary+of+State+calls+on+Prime+Minister+Shri+Narendra+Modi>

<sup>20</sup> Secretary of State Marco Rubio and Indian External Affairs Minister Dr. Subrahmanyam Jaishankar at a Joint Press Availability, May 24, 2026, <https://www.state.gov/releases/office-of-the-spokesperson/2026/05/secretary-of-state-marco-rubio-and-indian-external-affairs-minister-dr-subrahmanyam-jaishankar-at-a-joint-press-availability/>

Secretary Rubio repeatedly highlighted that India was an important strategic partner of the US and the shared values, as well as the free and open media. He said that there are only a handful of countries in the world that have both the economic and diplomatic power to be influential and strategic issues from a global perspective, and India was one of them. He spoke of the strategic alignment of both countries on energy. On the US migration and visa system, he was defensive, observing that changes were not India focused, they were global and being applied across the world, in response to the migratory crisis the US faced. He was similarly defensive about racist comments against Indians in the US, observing that there are stupid people in the US who make dumb comments all the time, as there are everywhere (Donald Trump had in April 2026 sparked widespread outrage after resharing a post on Truth Social that characterised India and China as “hellholes”, leading the MEA to officially criticise the comments as "uninformed, inappropriate, and in poor taste"<sup>21</sup>). He defended US actions in Iran, and observed that the Strait of Hormuz was an international waterway that Iran didn't own. He also defended US actions to rebalance its global trade, but ducked a question on why special sanctions were imposed on India but not on China for buying Russian oil. On Pakistan, he observed that US relations with that country would not be at the expense of strategic relations with India.

As noted by EAM Dr. S. Jaishankar, the Trump Administration has been very forthright in putting forward its foreign policy outlook as America First. Left unsaid was the understanding that this outlook effectively treats India as an economic adversary and a geopolitical lightweight, while hyphenating India and Pakistan once again. India has a view of India First, and that will guide India's foreign policy. India and the US signed a bilateral critical minerals framework<sup>22</sup>, seeking to deepen cooperation across the entire critical minerals and rare-earth supply chain, including mining, processing, recycling, and related investments.

The US relationship remains consequential for India. Bilateral trade between the two countries, inclusive of services, currently stands at about \$ 240 billion. Both sides are committed to raising this to \$ 500 billion by 2030. Both have expressed a desire for early conclusion of the interim agreement on bilateral trade. India remains committed to diversifying its sources of energy, including buying from the US. The potential to increase nuclear energy cooperation is vast. Defence cooperation continues to be

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<sup>21</sup> Official Spokesperson's response regarding a social media post, April 23, 2026, [https://www.mea.gov.in/response-to-queries.htm?dtl/41078/Official\\_Spokespersons\\_response\\_to\\_media\\_queries\\_regarding\\_a\\_social\\_media\\_post](https://www.mea.gov.in/response-to-queries.htm?dtl/41078/Official_Spokespersons_response_to_media_queries_regarding_a_social_media_post)

<sup>22</sup> Secretary of State Marco Rubio and Indian External Affairs Minister Dr. S. Jaishankar at the Signing of a Critical Minerals Framework, May 26, 2026, <https://www.state.gov/releases/office-of-the-spokesperson/2026/05/secretary-of-state-marco-rubio-and-indian-external-affairs-minister-subrahmanyam-jaishankar-at-the-signing-of-a-critical-minerals-framework/>

strong, with substantial potential for growth. US assistance in developing India's technological capacity has started yielding results. It seems evident that India has internalised the changed US approach brought out by Landau, Colby and now Rubio, and decided that it remains in its interest to continue with the relationship with the US, while avoiding becoming a dependency.

In sum, while Rubio came bearing honeyed words (and little else of note) and repeatedly claimed that the two largest democracies remain strategically aligned, his words do not enhance strategic confidence in the backdrop of Washington's transactional America First policy. The fact that he made the time to come indicates there is still American interest in the strategic partnership with India. It appears to be in India's interest to continue with the partnership, while keeping its cards close to its chest and keeping its options open.

## The Takaichi Visits to Vietnam and Australia

Japan's Prime Minister Sanae Takaichi used the Golden Week<sup>23</sup> break to make her maiden visits to Vietnam and Australia, both important strategic partners. She was in Vietnam from May 01-03, and in Australia on May 04-05.

Japan has shifted manufacturing to Vietnam under its "China+1" strategy, with large companies like Honda, Toyota, Canon, Panasonic, Nidec, Sumitomo Electric, and Meiko shaping key production clusters across Vietnam's major industrial hubs. Vietnam has thus become a key investment destination and hub for Japan's supply chains. As of end-March 2026, Japan reportedly had 5,760 active projects in Vietnam with a registered capital of \$ 79 billion<sup>24</sup>. Both countries aim to boost investment by \$ 5 billion annually. Takaichi's visit was intended to position economic security as a pillar of cooperation between the two countries, as well as to deliver a foreign policy speech updating the "Free and Open Indo-Pacific (FOIP)" initiative<sup>25</sup>.

Australia, on the other hand, is a key resource partner and has become a quasi-ally in enhancing deterrence and regional stability. Japan's investment into Australia was A\$159.5 billion (approximately \$112.9 billion) in 2025, focussed on real estate, energy & resources, critical minerals, renewables, and technology<sup>26</sup>. The two countries have

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<sup>23</sup> The Golden Week is an eight-day span containing four Japanese national holidays: Showa Day, Constitution Memorial Day, Greenery Day and Children's Day. It is one of Japan's busiest travel seasons.

<sup>24</sup> Quand Minh, Chau Anh, "Japanese FDI in Vietnam: From manufacturing hub to strategic capital flows", April 30, 2026, <https://theinvestor.vn/japanese-fdi-in-vietnam-from-manufacturing-hub-to-strategic-capital-flows-d18967.html>

<sup>25</sup> Prime Minister Takaichi Spoke to the Press Regarding Her Upcoming Visit to Vietnam and Australia, May 1, 2026, <https://japan.kantei.go.jp/105/speech/202605/01kaiken.html>

<sup>26</sup> Japan-Australia Investment Report 2025: Partners in Economic Security, April 14, 2026, <https://www.hsfkramer.com/insights/2026-04/japan-australia-investment-report-2025>

a Reciprocal Access Agreement (RAA), enabling the training and operation of the two Armed Forces in each other's country. The Framework for Strategic Defence Coordination established in 2025 seeks to align strategic activities at all levels and in all situations. Takaichi's visit was intended to strengthen supply chains for critical minerals and diversify from China, bolster defence cooperation, build resilience against economic coercion, secure energy supplies and promote FOIP.

In Vietnam, Takaichi was hosted by Prime Minister Lê Minh Hung<sup>27</sup> and met General Secretary of the Communist Party and President of Viet Nam To Lam<sup>28</sup> and President of the National Assembly Tran Thanh Man<sup>29</sup>. Leaders from both sides agreed on deepening cooperation under the Comprehensive Strategic Partnership and set a target of increasing bilateral trade to \$ 60 billion by 2030. They concurred on new priority areas of economic cooperation: energy, critical minerals, AI, semiconductors and space. They agreed on cooperating for strengthening supply chains for critical minerals including rare earths in Vietnam. They further agreed on advancing security cooperation and strengthening Vietnam's maritime law enforcement capabilities. Six agreements were signed covering agriculture, space technology (satellite data exchange), disaster-resilient infrastructure, and climate change adaptation. Views were exchanged not only on the situation in the Middle East, but also on the South China Sea and on the Korean peninsula. The importance of expanding the CPTPP while maintaining its high standards also came in for discussion. The visit confirmed Vietnam as a key partner in Japan's updated regional strategy of building strategic self-reliance and secure, stable and resilient supply chains.

The themes of Takaichi's foreign policy speech at the Vietnam National University in Hanoi were building Japan-Vietnam cooperation and presenting an updated vision for a Free and Open Indo-Pacific (FOIP)<sup>30</sup>. Noting the commonalities between FOIP and the ASEAN Outlook on the Indo-Pacific (AOIP), she said Japan would play an even more proactive role in fulfilling its responsibilities and contributing to the building of an international order based on freedom, openness, diversity, inclusiveness, and the rule of law. Takaichi's updated FOIP envisaged three priority areas to strengthen the autonomy and resilience of regional countries: building economic infrastructure for the age of AI and data including strengthening supply chain resilience for energy and critical minerals; co-creation of economic growth

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<sup>27</sup> Japan-Viet Nam Summit Meeting between Prime Minister TAKAICHI and Prime Minister Lê Minh Hung (Summary), May 02, 2026, <https://japan.kantei.go.jp/105/diplomatic/202605/02vietnam.html>

<sup>28</sup> Japan-Vietnam Summit Meeting and Luncheon between Prime Minister Takaichi and H.R. Mr. To Lam, General Secretary of the Communist Party and President of Vietnam, May 02, 2026, <https://japan.kantei.go.jp/105/diplomatic/202605/02vietnam2.html>

<sup>29</sup> Meeting between Prime Minister TAKAICHI and H.E. Mr. Tran Thanh Man, President of the National Assembly of Viet Nam (Summary), May 02, 2026, <https://japan.kantei.go.jp/105/diplomatic/202605/02vietnam3.html>

<sup>30</sup> Foreign Policy Speech by Prime Minister TAKAICHI Sanae, May 02, 2026, <https://japan.kantei.go.jp/105/speech/202605/02fpspeech.html>

opportunities through public-private collaboration and rule sharing; and enhancing security cooperation to ensure regional peace and stability (the three pillars announced in 2016 by former Prime Minister Shinzo Abe were promotion and establishment of the rule of law, freedom of navigation and free trade; pursuit of economic prosperity including improved connectivity; and the commitment to peace and stability).

Her visit to Australia coincided with the 50th anniversary of the Basic Treaty of Friendship and Cooperation, emphasising the growth in and importance of the partnership during disruptions to global supply chains. Four joint statements were issued: an Australia-Japan Joint Declaration on Economic Security Cooperation<sup>31</sup>; an Australia-Japan Joint Statement on Elevated Critical Minerals Cooperation<sup>32</sup>; an Australia-Japan Joint Statement on Energy Security Cooperation<sup>33</sup>; and a Leaders Statement on Enhanced Defence and Security Cooperation<sup>34</sup>. The two countries established a strategic cyber partnership<sup>35</sup>, seeking to harden cyber defences, build a resilient region and exercise global leadership, strengthen public-private partnerships and enhance collaboration on critical technology security, including in relation to AI. A new Track 1.5 Australia-Japan leadership dialogue was established<sup>36</sup>. The two leaders agreed to strengthen frameworks such as the Quad and the Japan-US-Australia trilateral. In sum, the visit advanced both Japan's resource security as well as deterrence and regional stability.

Takaichi's first tour to Asia has enabled her to establish personal bonds with the new generation of leadership in Vietnam, as well as the Australian leadership. She will now be able to make a first-hand assessment of the commitment of two important regional partners towards the bilateral relationship as well as their views on the Indo-Pacific. Perhaps the greatest acknowledgement of the visit's success came in the Chinese state media accusing Takaichi of wrapping outdated Cold War instincts in the honey of economic incentives to isolate China, and opposing FOIP for attempting to promote bloc confrontation and interfering in regional issues like the South China Sea.

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<sup>31</sup> Japan-Australia Joint Declaration on Economic Security Cooperation, May 04, 2026, [https://japan.kantei.go.jp/contents/topics/22063\\_ext\\_20\\_0.pdf](https://japan.kantei.go.jp/contents/topics/22063_ext_20_0.pdf)

<sup>32</sup> Japan-Australia Joint Statement on Elevated Critical Minerals Cooperation, May 04, 2026, [https://japan.kantei.go.jp/contents/topics/22063\\_ext\\_20\\_2.pdf](https://japan.kantei.go.jp/contents/topics/22063_ext_20_2.pdf)

<sup>33</sup> Australia-Japan Joint Statement on Energy Security Cooperation, May 04, 2026, <https://www.pmc.gov.au/resources/australia-japan-joint-statement-energy-security>

<sup>34</sup> Leaders Statement on Enhanced Defence and Security Cooperation, May 04, 2026, [https://japan.kantei.go.jp/contents/topics/22063\\_ext\\_20\\_4.pdf](https://japan.kantei.go.jp/contents/topics/22063_ext_20_4.pdf)

<sup>35</sup> Australia-Japan Strategic Cyber Partnership, May 04, 2026, [https://japan.kantei.go.jp/contents/topics/22063\\_ext\\_20\\_3.pdf](https://japan.kantei.go.jp/contents/topics/22063_ext_20_3.pdf)

<sup>36</sup> Australia-Japan leadership dialogue, May 04, 2026, <https://www.pm.gov.au/media/australia-japan-leadership-dialogue>

## Japan Accelerates Defence Partnerships Across Southeast Asia

by

Divya Rai

Japan's Defence Minister Koizumi Shinjiro visited Indonesia and the Philippines from May 3 to 6 for discussions with his counterparts from both countries. The key takeaway from his visit is Japan's expansion of security partnerships across Southeast Asia on the heels of its revision of Three Principles on Transfer of Defence Equipment and Technology<sup>37</sup>.

On May 4, Koizumi met with Indonesian Defence Minister General Sjafrie Sjamsoeddin (Retd) in Jakarta. The two sides signed a Defence Cooperation Arrangement (DCA), covering a broad range of cooperation including capacity building, education and research, joint training, maritime security, and humanitarian assistance and disaster relief (HADR).<sup>38</sup> The DCA also opens the door for cooperation in defence equipment and technology, to be developed incrementally based on each country's needs and national interests. The two ministers also agreed to launch an "Integrated Defence Dialogue Mechanism" to deepen the bilateral defence partnership through consultations at the ministerial, vice-ministerial, and senior military levels. They further agreed to advance discussions on the protection of classified military information, with a view to strengthening operational cooperation, and to hold working-level consultations to advance collaboration in defence equipment and technology that would contribute to augmenting deterrence capabilities.<sup>39</sup>

Japan reportedly offered Indonesia Mogami-class frigates and submarines. Indonesian naval officials acknowledged interest in both platforms, though they noted that the proposals remain under review by the Ministry of Defence, with a final decision yet to be made. The interest is not new. President Prabowo Subianto, who has made modernising Indonesia's ageing military assets a priority since taking office in 2024, first expressed serious interest in Japan's 30FFM frigates – later renamed the Mogami class – during his tenure as Defence Minister in 2021<sup>40</sup>. Over the past five

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<sup>37</sup> The Diplomat, "Breaking the Postwar Taboo: Japan Lifts Its Ban on Lethal Arms Exports," April 2026, <https://thediplomat.com/2026/04/breaking-the-postwar-taboo-japan-lifts-its-ban-on-lethal-arms-exports/>.

<sup>38</sup> Joint Press Statement H.E. Shinjiro Koizumi, Minister of Defense of Japan and H.E. Sjafrie Sjamsoeddin, Minister of Defence of the Republic of Indonesia Jakarta, Indonesia, 4 May 2026. <https://www.mod.go.jp/en/article/2026/05/d74c99e9d91eb347d7a5f852e07e7a7581c82504.html>

<sup>39</sup> Ministry of Defence of Japan, Joint Press Statement H.E. Shinjiro Koizumi, Minister of Defense of Japan and H.E. Sjafrie Sjamsoeddin, Minister of Defence of the Republic of Indonesia, Jakarta, Indonesia, 4 May 2026 <https://www.mod.go.jp/en/images/d92a55a2efe8a932da22048f7b9b8e39b9960273.pdf>

<sup>40</sup> Naval News, "Indonesia Confirms Mogami Frigates and Submarine Offers from Japan," May 2026, <https://www.navalnews.com/naval-news/2026/05/indonesia-confirms-mogami-frigates-and-submarine-offers-from-japan/>.

years, Indonesia has diversified its naval acquisitions, procuring vessels from Italy, Turkey, France, and South Korea. Adding Japanese platforms into this mix would deepen rather than resolve that complexity. Indonesia already struggles with the logistical burden of maintaining a fleet sourced from multiple suppliers, each with its own supply chain, spare parts network, and maintenance requirements – a serious constraint for a navy stretched across a vast archipelago. The more pertinent question is whether Japan can offer a long-term industrial partnership, including local production and technology transfer, to help Indonesia manage this burden rather than make it worse. The DCA's language about cooperation being developed "gradually based on each country's needs" suggests Jakarta is keeping its options open.

From Jakarta, Koizumi flew to Manila, where he held talks with his counterpart Gilberto Teodoro and was separately received by President Ferdinand Marcos Jr. Both defence ministers reaffirmed strong opposition to any unilateral attempts to change the status quo by force or coercion in the East China Sea and the South China Sea and expressed serious concern over the increasing scale and frequency of China's coercive activities in both theatres. Capitalising on Japan's relaxed export rules, the two sides signed a 'Statement on the Further Promotion of Defence Equipment and Technology Cooperation' between their respective defence establishments. The ministers also confirmed their intention to ensure the integrated functioning of existing and new consultation platforms at the ministerial, vice-ministerial, and working levels, covering policy, operations, and defence equipment and technology cooperation.<sup>41</sup>

The Manila visit also built on foundations already laid. The Japan-Philippines Reciprocal Access Agreement, signed in 2024<sup>42</sup>, has since enabled Japanese Self-Defence Forces personnel to participate in the Balikatan exercises. The Acquisition and Cross-Servicing Agreement (ACSA), signed in January 2026, further established a reciprocal framework for the exchange of supplies and services during joint training, disaster relief, and peacekeeping operations. Building on this, the two ministers also agreed to establish an institutional framework for information sharing to enhance maritime domain awareness capabilities.<sup>43</sup>

Taken together, the agreements reveal Japan's major priorities with Southeast Asia. The first is building the informational and logistical foundations for effective operational interoperability – enabling Japanese and partner forces to operate jointly across exercises, disaster relief missions, and peacekeeping operations. The second is

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<sup>41</sup> Japan Ministry of Defense, "Japan-Philippines Defense Ministers' Joint Press Statement," May 5, 2026, <https://www.mod.go.jp/en/images/e32749c6ca0b5c06c0d1380fc3ae7e4992d3a75e.pdf>.

<sup>42</sup> Reciprocal Access Agreement between Japan and Philippines. <https://www.mofa.go.jp/files/100962093.pdf>

<sup>43</sup> Japan Ministry of Defense. Statement by the Defense Ministers of Japan and the Philippines on the Further Promotion of Defense Equipment and Technology Cooperation <https://www.mod.go.jp/en/article/2026/05/cc86e9f8075c31eb64ce2becd453401d7540b254.html>

positioning Japan as a defence equipment and technology partner of choice. Japan offers something unique: a partnership without political pressure. Japan's defence cooperation with Indonesia and the Philippines has unlocked deeper hardware cooperation. As Indonesia and the Philippines operate common Japanese platforms, they gain access to shared command and communications systems, maintenance and supply networks, and training programmes, enabling significantly expanded cooperation at the operational level. The third priority, underpinning both above, is a clear strategic imperative: working with regional partners to preserve the status quo in East Asia against coercive attempts of China to alter it by force.

Yet Japan's two new partnerships are not equivalent. Manila has moved forward with signing a succession of binding agreements that point unambiguously toward deeper operational integration. Jakarta's posture, on the other hand, is more cautious. As China remains Indonesia's largest regional trading partner, Jakarta avoids being seen as joining an anti-China security coalition, however the arrangements are framed. Japan may find a frontline partner in Manila and a more cautious, arms-length relationship in Jakarta.

President Trump's administration's transactional approach – applying pressure to allies and adversaries alike and engaging selectively in regional contingencies – has prompted Tokyo to strengthen horizontal ties among regional middle powers, particularly in Southeast Asia. For decades, Japan has established a reputation as a dependable and genuinely reciprocal partner for the Southeast Asian countries. Through its Official Development Assistance (ODA) programme, Tokyo has funded roads, ports, and public infrastructure across the region. The new defence export policy and the expanding security partnerships pursued under Prime Minister Sanae Takaichi represent a natural extension of that posture into a new domain. Japan is no longer only investing in physical infrastructure; it is now offering to help build defence equipment and is committing itself to a broader regional security framework.

## Other Indo-Pacific Developments

US – Iran War. A fragile ceasefire, extended indefinitely by President Trump on April 21, 2026, continued through the month. Media reports indicated that an extension by 60 days was imminent<sup>44</sup>. The US has not been able to displace Iran's theocratic regime or overcome its denial of the Strait of Hormuz and resistance to nuclear concessions. The truce has repeatedly been tested by direct military skirmishes, such as US "self-defence" strikes and Iranian attacks including firing a ballistic missile at a US base in

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<sup>44</sup> Jonathan Landay, Steve Holland, Gram Slattery and Humeyra Pamuk, "US-Iran MOU on 60-day ceasefire extension reached, but Trump must approve, sources say", May 28, 2026, <https://www.reuters.com/world/middle-east/us-iran-mou-60-day-ceasefire-extension-reached-trump-must-approve-source-says-2026-05-28/>

Kuwait<sup>45</sup>. A purported draft agreement for a 60-day ceasefire extension did not receive Presidential approval as of May 29; even though Trump claimed that the deal includes opening of the Strait of Hormuz without tolls, removal of mines, a commitment by Iran to never pursue a nuclear weapon, and destruction of Iran's enriched Uranium<sup>46</sup>. Iran's media, on the other hand, states that Trump has presented points that contradict the text of the draft, and that no final understanding has been reached. Iran insists that its frozen assets must be addressed before any preliminary deal and current discussions do not involve details of the nuclear issue<sup>47</sup>. Iran's Foreign Ministry Spokesperson Esmail Baghaei categorically said that the proposed agreement with the US has not been finalised<sup>48</sup>.

UNSC Resolution to Secure the Strait of Hormuz. The US, along with Bahrain, Saudi Arabia, UAE, Kuwait and Qatar drafted a UNSC resolution to defend freedom of navigation in the Strait of Hormuz<sup>49</sup>. The draft resolution requires Iran to cease attacks, mining, and tolling, and demands that Iran disclose the number and location of the sea mines it has laid and cooperate with efforts to remove them, while also supporting the establishment of a humanitarian corridor. The resolution has not, however, been put to vote. China and Russia have signalled that they could veto the resolution.

Project Freedom. The US launched Project Freedom, intended to restore freedom of navigation for commercial shipping through the Strait of Hormuz, on May 04<sup>50</sup>. As part of the operation, three USN destroyers (USS Truxtun, Mason and Rafael Peralta) went into the Strait of Hormuz to guide shipping through the Strait<sup>51</sup>. They came under intense Iranian attack, but were not hit. Project Freedom was, however, called off on May 06 due to the Saudi refusal to permit US aircraft to use Prince Sultan Air Base for it. The three destroyers exited Hormuz Strait on May 07<sup>52</sup>.

Iran Launches Persian Gulf Strait Authority. Iran Supreme National Security Council officially announced the launch of the Persian Gulf Strait Authority (PGSA) on May

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<sup>45</sup> Statement from CENTCOM on Recent Iranian Aggression, May 28, 2026, <https://www.centcom.mil/MEDIA/PUBLIC-RELEASES/Article/4502431/statement-from-centcom-on-recent-iranian-aggression/>

<sup>46</sup> Aoife Walsh, "No deal announced after Trump meeting to make 'final determination' on Iran", May 30, 2026, <https://www.bbc.com/news/articles/c0r2d40r91qo>

<sup>47</sup> No final Iran-US understanding reached yet - Tasnim, May 29, 2026, <https://www.iranintl.com/en/202605297184>

<sup>48</sup> Iran denies ceasefire deal with US is finalised, May 30, 2026, <https://www.aljazeera.com/video/newsfeed/2026/5/29/iran-denies-ceasefire-deal-with-us-is>

<sup>49</sup> The United States Proposes a UN Security Council Resolution to Defend Freedom of Navigation and Secure the Strait of Hormuz, May 05, 2026, <https://www.state.gov/releases/office-of-the-spokesperson/2026/05/the-united-states-proposes-a-un-security-council-resolution-to-defend-freedom-of-navigation-and-secure-the-strait-of-hormuz/>

<sup>50</sup> U.S. Military Supports Launch of Project Freedom in Strait of Hormuz, May 3, 2026, <https://www.centcom.mil/MEDIA/PRESS-RELEASES/Press-Release-View/Article/4476318/us-military-supports-launch-of-project-freedom-in-strait-of-hormuz/>

<sup>51</sup> <https://x.com/CENTCOM/status/2051274596570050755>

<sup>52</sup> CENTCOM Protects U.S. Warships Transiting Strait of Hormuz, May 07, 2026, <https://www.centcom.mil/MEDIA/PRESS-RELEASES/Press-Release-View/Article/4480437/centcom-protects-us-warships-transiting-strait-of-hormuz/>

18<sup>53</sup>. According to media reports, vessels intending to transit the strait will receive an email from the PGSA outlining rules and regulations for passage. are required to adjust their operations according to the framework and obtain a transit permit before crossing the Strait<sup>54</sup>. The transit permit will be given only after a service toll is settled. Iran's Vice President Mohammad Reza Aref has said that the Strait belongs to Iran, and will not be given up at any cost. The PGSA signals the transition to a structured, permanent bureaucratic mechanism to manage traffic through the Strait of Hormuz.

Trump Asks West Asian Countries to Joint Abraham Accords. US President Donald Trump asked Saudi Arabia, Qatar, Pakistan, Turkey, Egypt and Jordan to “mandatorily” join the Abraham Accords<sup>55</sup> to normalise relations with Israel as a condition for participating in what he described was a historic regional settlement with Iran<sup>56</sup>. He warned that countries refusing to do so would not be part of the Iran deal. The demand is probably based on his desire to show the public a diplomatic win to offset concessions to Iran, but is unlikely to gain much traction amongst the target countries.

President Putin Visits Beijing. Shortly after the Trump visit on May 13-15, Russia's President Vladimir Putin was received at Beijing for his 25<sup>th</sup> visit, from May 19-20. The visit focused on strategic coordination, energy (Russia is amongst China's largest energy suppliers), security and long-term geopolitical alignment. The two leaders extended<sup>57</sup> the 2001 China-Russia Treaty of Good Neighbourliness and Friendly Cooperation for the second time<sup>58</sup>. They signed and issued the Joint Statement Between the People's Republic of China and the Russian Federation on Further Strengthening Comprehensive Strategic Coordination and Deepening Good-Neighbourliness and Friendly Cooperation<sup>59</sup> and witnessed the signing of 40 inter-governmental, inter-agency and corporate cooperation documents covering economy and trade, education, and science and technology. The bilateral visa-free travel regime for both nations was extended to the end of 2027. Leaders denounced the US Golden

<sup>53</sup> Iran officially announces new body to manage Strait of Hormuz: Top security council, May 18, 2026, <https://www.channelnewsasia.com/world/iran-hormuz-strait-new-body-manage-us-war-persian-gulf-strait-authority-6127991>

<sup>54</sup> Iran launches new Hormuz transit permit system - Press TV, May 05, 2026, <https://www.iranintl.com/en/202605050362>

<sup>55</sup> Lindsay Wise, Meredith McGraw and Alexander Ward, “Trump Thinks Bigger on Mideast as Iran Framework Brings Criticism”, May 25, 2026, <https://www.wsj.com/world/middle-east/trump-thinks-bigger-on-mideast-as-iran-framework-draws-fire-17c3ac8e>

<sup>56</sup> Doina Chiacu and Humeyra Pamuk, “Trump links Abraham Accords to any Iran deal”, May 25, 2026, <https://www.reuters.com/world/middle-east/trump-links-abraham-accords-iran-deal-2026-05-25/>

<sup>57</sup> China-Russia Treaty of Good-Neighbourliness and Friendly Cooperation extended, May 20, 2026, <https://news.cgtn.com/news/2026-05-20/news-1NiHBAb2Mg/p.html>

<sup>58</sup> Treaty of Good-Neighbourliness and Friendly Cooperation Between the People's Republic of China and the Russian Federation, July 16, 2001, [https://www.peaceagreements.org/media/documents/ag1735\\_57fb5eaecbea8.pdf](https://www.peaceagreements.org/media/documents/ag1735_57fb5eaecbea8.pdf)

<sup>59</sup> President Xi Jinping Holds Talks with Russian President Vladimir Putin, May 20, 2026, [https://www.fmprc.gov.cn/mfa\\_eng/xw/zyxw/202605/t20260520\\_11914648.html](https://www.fmprc.gov.cn/mfa_eng/xw/zyxw/202605/t20260520_11914648.html)

Dome and space weapons, and said that Japan's current course of accelerated rearmament poses a serious threat to peace and stability in the region. They further expressed serious concern about Japan's accumulation of sensitive nuclear materials and the highly provocative steps of Japan's right-wing forces to revise its non-nuclear principles<sup>60</sup>. Trade between the two sides reached \$ 240 billion in 2025, almost all of it in Rubles or Yuan, thus shielding it from external influence. The two sides also issued a joint statement advocating a multipolar world and new type of international relations<sup>61</sup>, setting out four principles (openness, inclusivity and mutually beneficial cooperation; indivisible and equal security; democratisation of international relations and improvement of the global governance system; and acceptance of world civilisational and value diversity) under which the world should be run. The failure to conclude the Power of Siberia 2 gas pipeline deal was notable, indicating that cooperation will only be on China's terms. In sum, the Putin visit strengthened the China-Russia strategic convergence and partnership (in which Russia is clearly the junior partner), while the outcomes from Trump's visit were limited to claimed commercial deals.

PM Modi's Visit to the UAE. Prime Minister Narendra Modi made a brief but consequential visit to the UAE on May 15<sup>62</sup>. It was his eighth visit to the country in the last 12 years, and as a reflection of the warmth of the bilateral relationship, he was received at the airport by HH Sheikh Mohammed bin Zayed Al-Nahyan, the UAE President. The two sides concluded an MoU on UAE participation in India's strategic petroleum reserves, storage of crude oil in Fujairah and collaboration for LNG and LPG storage facilities in India<sup>63</sup>. The UAE announced an investment of \$ 5 billion in India. The two leaders concluded a framework on a strategic defence partnership, under which they will strengthen collaboration in defence manufacturing, defence technology, defence equipment and coordination in other areas. Agreements were signed between Cochin Shipyard and Dubai's Drydocks World to set up a ship repair cluster in Vadinar and a centre for skill development in the maritime field. A term sheet for the setting up of an 8 Exaflop supercomputing cluster was signed. Prime Minister Modi conveyed India's strongest condemnation of the attacks on the UAE and reiterated the need for unimpeded transit passage through the Strait of Hormuz. In sum, the visit indicates India's movement towards an integrated Gulf strategy, encompassing energy partnerships, defence coordination and cooperation, maritime

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<sup>60</sup> Joint statement warns of Japan's 'accelerated rearmament', May 20, 2026, <https://www.bbc.com/news/live/c86d7yqyyz6t>

<sup>61</sup> Joint Declaration of the Russian Federation and the People's Republic of China on the Establishment of a Multipolar World and a New Type of International Relations, May 20, 2026, <http://kremlin.ru/supplement/6486>

<sup>62</sup> Prime Minister's Visit to the United Arab Emirates, May 15, 2026, [https://www.mea.gov.in/press-releases.htm?dtl/41146/Prime\\_Ministers\\_visit\\_to\\_the\\_United\\_Arab\\_Emirates\\_May\\_15\\_2026](https://www.mea.gov.in/press-releases.htm?dtl/41146/Prime_Ministers_visit_to_the_United_Arab_Emirates_May_15_2026)

<sup>63</sup> List of Outcomes: Prime Minister's Visit to the United Arab Emirates, May 15, 2026, [https://www.mea.gov.in/bilateral-documents.htm?dtl/41145/List\\_of\\_Outcomes\\_Prime\\_Ministers\\_Visit\\_to\\_the\\_UAE\\_May\\_15\\_2026](https://www.mea.gov.in/bilateral-documents.htm?dtl/41145/List_of_Outcomes_Prime_Ministers_Visit_to_the_UAE_May_15_2026)

security, food security, critical infrastructure and diaspora issues, with the UAE as India's most dependable partner in the region.

PM Modi's Visit to the Netherlands. Prime Minister Narendra Modi visited the Netherlands on May 16, elevating the bilateral relationship to a 'Strategic Partnership' and adopting a strategic partnership roadmap under which the two sides will work through regular and structured cooperation in areas encompassing economic cooperation and trade, defence and security, emerging technologies, innovation, science, education, energy security and transition, water management, maritime development, health, agriculture, culture and people-to-people exchanges, among others<sup>64</sup>. An agreement was signed between Tata Electronics and ASML under which ASML will support India's upcoming 300-millimeter semiconductor fabrication plant in Dholera, Gujarat. Netherlands agreed to join the Indo-Pacific Oceans Initiative. The two countries launched a roadmap on green hydrogen, linking Dutch production, storage, and industrial decarbonisation technology with India's National Green Hydrogen Mission. A Letter of Intent was signed for cooperation with regard to the Kalpasar Project in Gujarat. The new India-Netherlands strategic partnership will help India in localising the production of critical microchips relevant to AI, position Rotterdam as the gateway for India's exports to the EU under the India-EU FTA, strengthen indigenous defence manufacturing and assist with India's proposed Kalpasar mega-project.

PM Modi's Visit to Sweden and Norway. Prime Minister Narendra Modi visited Sweden and Norway from May 17-19. In Sweden, he was received at the airport by his counterpart Mr. Ulf Kristersson. The two sides elevated relations to a strategic partnership resting on four pillars: strategic dialogue, economic partnership, emerging technologies and trusted connectivity, and shaping the future together<sup>65</sup>. They adopted the Joint Action Plan for implementation of the strategic partnership<sup>66</sup>. The target of doubling bilateral trade by 2030 was set. It was decided to enhance cooperation in AI, 5G, 6G, defence and security, cyber security, quantum technologies, digital infrastructure and space. In Norway, the two countries elevated the bilateral relationship to a "Green Strategic Partnership", encompassing cooperation in climate issues and environmental matters, the energy transition and energy security, the blue economy, green shipping and ports, fisheries, aquaculture and seafood, education,

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<sup>64</sup> India-Netherlands Joint Statement on the Visit of Prime Minister of India to the Netherlands (May 16-17, 2026), May 16, 2026, <https://www.pib.gov.in/PressReleasePage.aspx?PRID=2261884&reg=3&lang=1>

<sup>65</sup> Joint Statement on the India-Sweden Summit, 'Establishment of a Strategic Partnership' May 17, 2026, [https://www.mea.gov.in/bilateral-documents.htm?dtl/41172/Joint\\_Statement\\_on\\_the\\_IndiaSweden\\_Summit\\_Establishment\\_of\\_a\\_Strategic\\_Partnership](https://www.mea.gov.in/bilateral-documents.htm?dtl/41172/Joint_Statement_on_the_IndiaSweden_Summit_Establishment_of_a_Strategic_Partnership)

<sup>66</sup> Joint Action Plan 2026-2030 for the implementation of the India-Sweden Strategic Partnership, May 17, 2026, [https://www.mea.gov.in/bilateral-documents.htm?dtl/41173/Joint\\_Action\\_Plan\\_20262030\\_for\\_the\\_implementation\\_of\\_the\\_IndiaSweden\\_Strategic\\_Partnership](https://www.mea.gov.in/bilateral-documents.htm?dtl/41173/Joint_Action_Plan_20262030_for_the_implementation_of_the_IndiaSweden_Strategic_Partnership)

healthcare and mobility, among others<sup>67</sup>. The two leaders reiterated their shared commitment to promoting a free, open, peaceful and prosperous Indo-Pacific, in accordance with international law, including UNCLOS. India welcomed Norway joining the Indo-Pacific Oceans Initiative. Prime Minister Modi also participated in the 3<sup>rd</sup> India-Nordic Summit on May 19<sup>68</sup>. Leaders agreed to strengthen maritime security cooperation, reinforcing their commitment to promoting a free, open, peaceful and prosperous Indo-Pacific in accordance with international law, including UNCLOS. They also discussed cooperation in climate action, the green transition and environment; the blue economy; Artificial Intelligence, innovation, research, education and space; Arctic and Polar research; and on defence equipment. In sum, the visit advanced India's strategic, technological and economic ties with the region.

Prime Minister Modi's Visit to Italy. Prime Minister Modi paid an official visit to Italy from May 19-20. He and his Italian counterpart Giorgia Meloni decided to elevate India-Italy relations to a special strategic partnership<sup>69</sup>. Leaders agreed to meet annually including on the sidelines of multilateral events and to establish a Foreign Ministers led mechanism to review the India-Italy Joint Strategic Action Plan 2025-2029. They reaffirmed their shared objective of expanding two-way bilateral trade to € 20 billion by 2029, and reconfirmed their commitment to cooperate on the India-Middle East-Europe Economic Corridor (IMEC). They announced the creation of INNOVIT India, an innovation hub aimed at strengthening cooperation between the respective innovation ecosystems. Expressing satisfaction at the deepening of defence cooperation, they welcomed the adoption of a Joint Declaration of Intent and a Defence Cooperation Roadmap which will promote partnerships in co-production and co-development of helicopters, naval platforms, marine armament and electronic warfare. Leaders agreed to launch a dialogue on maritime security and reaffirmed their shared commitment to a free, open, peaceful and prosperous Indo-Pacific.

Vietnam's President To Lam Visits India. Vietnam's President To Lam, accompanied by a high level ministerial and official delegation along with top business leaders, visited India from May 5-7<sup>70</sup>. It was his second international visit, after China in April 2026. Ties between India and Vietnam were elevated to an Enhanced Comprehensive Strategic Partnership. 13 MoUs in areas ranging from digital payments to culture to

<sup>67</sup> India-Norway Joint Statement, May 18, 2026, [https://www.mea.gov.in/bilateral-documents.htm?dtl/41184/IndiaNorway\\_Joint\\_Statement\\_May\\_18\\_2026](https://www.mea.gov.in/bilateral-documents.htm?dtl/41184/IndiaNorway_Joint_Statement_May_18_2026)

<sup>68</sup> Joint Statement: 3<sup>rd</sup> India-Nordic Summit, May 19, 2026, [https://www.mea.gov.in/bilateral-documents.htm?dtl/41190/Joint\\_Statement\\_3rd\\_IndiaNordic\\_Summit\\_May\\_19\\_2026](https://www.mea.gov.in/bilateral-documents.htm?dtl/41190/Joint_Statement_3rd_IndiaNordic_Summit_May_19_2026)

<sup>69</sup> India-Italy Joint Declaration, May 20, 2026, [https://www.mea.gov.in/bilateral-documents.htm?dtl/41198/IndiaItaly\\_Joint\\_Declaration\\_May\\_20\\_2026](https://www.mea.gov.in/bilateral-documents.htm?dtl/41198/IndiaItaly_Joint_Declaration_May_20_2026)

<sup>70</sup> Joint Statement on Enhanced Comprehensive Strategic Partnership between the Republic of India and the Socialist Republic of Vietnam, May 06, 2026, <https://www.pib.gov.in/PressReleasePage.aspx?PRID=2258431&reg=3&lang=1>

rare earth elements and pharma were concluded<sup>71</sup>. The two sides expanded the scope of their technological cooperation to encompass Artificial Intelligence, Quantum Technologies and rare earth minerals. A target of \$25 billion of bilateral trade by 2030 was set, as compared to the present \$ 16 billion. Vietnam agreed to join India's Indo-Pacific Oceans Initiative and to depute a Liaison Officer to IFC (IOR) in Gurugram. A White Shipping Information Sharing Agreement is under negotiation. Vietnam has made steady progress in utilising the \$500 million defence line of credit offered by India, with \$ 300 going towards the procurement of 14 high-speed patrol boats and 3-4 OPVs, while the balance will go towards the upgradation of some Vietnamese Navy ships and purchase of submarine batteries. The two sides look forward to the establishment of a Strategic Diplomacy - Defence Dialogue in the 2+2 format involving their foreign and defence ministries.

Cyprus Strategic Partnership. Cyprus became India's 45<sup>th</sup> strategic partner when its president, Mr. Nikos Christodoulides, paid a state visit from May 20-23<sup>72</sup>. A roadmap for bilateral defence cooperation was signed, along with six MoUs and seven other announcements<sup>73</sup>.

48<sup>th</sup> ASEAN Summit. The 48<sup>th</sup> ASEAN Summit took place at Cebu, in the Philippines, on May 08<sup>74</sup>. Leaders prioritised shielding the region from global energy and food supply disruptions and urged the ratification of the ASEAN Framework Agreement on Petroleum Security to create regional stockpiles of fuel to share during crises<sup>75</sup>. Leaders adopted a declaration on maritime cooperation<sup>76</sup>. The Philippines proposed the establishment of a maritime centre to help manage tensions and handle issues related to the South China Sea. Leaders addressed extra-regional conflicts, calling for the cessation of hostilities in Ukraine and reaffirming support for a "two-state solution" in the Middle East. They also engaged in discussions regarding constructive diplomatic engagement with Myanmar. The bloc reinforced its unity and centrality to ensure collective resilience and strategic autonomy amidst ongoing geo-economic volatility.

<sup>71</sup> List of Outcomes: State Visit of President of the Socialist Republic of Vietnam to India, May 06, 2026, <https://www.pib.gov.in/PressReleasePage.aspx?PRID=2258363&reg=3&lang=1>

<sup>72</sup> Joint Statement on the State Visit of the President of the Republic of Cyprus (May 20-23), May 22, 2026, [https://www.mea.gov.in/bilateral-documents.htm?dtl/41221/Joint\\_Statement\\_on\\_the\\_State\\_Visit\\_of\\_the\\_President\\_of\\_the\\_Republic\\_of\\_Cyprus\\_May\\_2023\\_2026](https://www.mea.gov.in/bilateral-documents.htm?dtl/41221/Joint_Statement_on_the_State_Visit_of_the_President_of_the_Republic_of_Cyprus_May_2023_2026)

<sup>73</sup> List of Outcomes: State Visit of President of the Republic of Cyprus, H.E. Mr. Nikos Christodoulides to India (May 20-23, 2026), May 22, 2026, [https://www.mea.gov.in/bilateral-documents.htm?dtl/41219/List\\_of\\_Outcomes\\_State\\_Visit\\_of\\_President\\_of\\_the\\_Republic\\_of\\_Cyprus\\_HE\\_Mr\\_Nikos\\_Christodoulides\\_to\\_India\\_May\\_2023\\_2026](https://www.mea.gov.in/bilateral-documents.htm?dtl/41219/List_of_Outcomes_State_Visit_of_President_of_the_Republic_of_Cyprus_HE_Mr_Nikos_Christodoulides_to_India_May_2023_2026)

<sup>74</sup> Chair's Statement of the 48<sup>th</sup> ASEAN summit, 8 May 2026, Cebu, Philippines, <https://asean.org/wp-content/uploads/2026/05/FINAL-Chairs-Statement-of-the-48th-ASEAN-Summit-as-of-09-May-2026-1200H.pdf>

<sup>75</sup> ASEAN Leaders' Statement on the Response to the Middle East Crisis, May 08, 2026, <https://asean.org/wp-content/uploads/2026/05/ASEAN-Leaders-Statement-on-the-Response-to-the-Middle-East-Crisis.pdf>

<sup>76</sup> ASEAN Leaders' Declaration on Maritime Cooperation, May 08, 2026, <https://asean.org/wp-content/uploads/2026/05/FINAL-ASEAN-Leaders-Declaration-on-Maritime-Cooperation.pdf>

Defence Minister Rajnath Singh Visits Vietnam. Following up on his interaction in New Delhi with General Phan Van Giang, his Vietnamese counterpart on May 06<sup>77</sup>, Defence Minister Shri Rajnath Singh visited Hanoi, Vietnam on May 19<sup>78</sup>. The two ministers reviewed the bilateral defence partnership and discussed ways to further deepen cooperation in maritime security, defence industry collaboration, military training and high-level exchanges, cyber security, capacity building & regional stability. They virtually inaugurated a Language Lab established with Indian assistance at the Air Force Officers' College, Vietnam. The acquisition of Brahmos cruise missiles by Vietnam was also discussed. Shri Rajnath Singh announced the setting up of an Artificial Intelligence Lab at the Telecommunications University in Nha Trang. India offered support for the maintenance of Vietnam's Kilo-class submarines and Su-30 fighter aircraft.

Defence Minister Rajnath Singh Visits South Korea. Defence Minister Shri Rajnath Singh visited Seoul for interaction with his South Korean counterpart Ahn Gyu-back on May 20<sup>79</sup>. The two ministers reviewed bilateral defence cooperation and discussed ways to further expand collaboration in defence production, maritime security, emerging technologies, military exchanges, logistics & regional security. Agreements were exchanged on promoting defence cyber cooperation, training exchanges and UN peacekeeping cooperation. A roadmap to unlock the potential of the India-Korea Defence Innovation Accelerator Ecosystem (KIND-X) was discussed. South Korea's emergence as a relatively low cost supplier of advanced military technology and its demonstrated willingness to "make in India" make it an attractive defence partner.

Japan – ROK Summit. The Prime Ministers of Japan and South Korea met at Andong on May 19<sup>80</sup>, marking a continuation of 'shuttle diplomacy' between the two countries. Talks focused on energy security, supply chain resilience, and regional stability amid global economic and geopolitical uncertainties. Leaders signed an agreement to enhance energy security cooperation, including strengthening supply resilience, coordinating strategic stockpiles for crude oil and liquefied natural gas (LNG), and setting up mechanisms for mutual product swap arrangements in the event of emergencies. They agreed to establish a new industry and trade policy dialogue between their respective economy and energy ministries to ensure stable supply

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<sup>77</sup> Raksha Mantri holds bilateral talks with Deputy Prime Minister & Minister of National Defence of Vietnam in New Delhi, May 6, 2026, <https://www.pib.gov.in/PressReleasePage.aspx?PRID=2258484&reg=3&lang=1>

<sup>78</sup> Raksha Mantri Shri Rajnath Singh and Vietnam's Deputy PM & Defence Minister General Phan Van Giang hold bilateral talks in Hanoi, May 19, 2026, <https://www.pib.gov.in/PressReleasePage.aspx?PRID=2262682&reg=3&lang=1>

<sup>79</sup> Raksha Mantri holds bilateral talks with Minister of National Defence, Republic of Korea in Seoul, May 20, 2026, <https://www.pib.gov.in/PressReleasePage.aspx?PRID=2263304&reg=3&lang=1>

<sup>80</sup> Japan – ROK Summit Meeting (Summary), May 19, 2026, <https://japan.kantei.go.jp/105/diplomatic/202605/19rok.html>

chains for critical minerals and technologies. They reaffirmed their commitment to bilateral security coordination, as well as trilateral cooperation with the United States, in response to shared regional challenges.

Japan Philippines Summit. Philippines President Ferdinand Marcos Jr. visited Japan from May 26-29 for a summit meeting with Prime Minister Sanae Takaichi<sup>81</sup>. The two leaders upgraded relations between their countries to a Comprehensive Strategic Partnership<sup>82</sup> seeking to realise the objective of FOIP and AOIP, the first of its kind for the Philippines and resting on the pillars of security cooperation, economic cooperation, maritime cooperation and other bilateral cooperation. They further decided to commence formal negotiations to delimit the maritime boundary of the EEZ and Continental Shelf between their countries, an action that China described as illegal, null and void and having no impact on China's claims in the area East of Taiwan<sup>83</sup>. It was Japan's third comprehensive strategic partnership in Southeast Asia, following Vietnam and Indonesia. Leaders agreed to promote the transfer of Japanese defence equipment to the Philippines, including destroyers, TC-90 maritime patrol Beechcraft and radar systems. Takaichi welcomed the Philippines' request to join the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) and expressed Japan's support for the early commencement of the accession process. Marcos became the fourth Philippine leader to address Japan's Diet. Leaders also announced the beginning of negotiations on a General Security of Military Information Agreement, Japan's first such agreement with a Southeast Asian nation. Growing cooperation between the two countries seeks to create an integrated security network in the Western Pacific, alongside Australia and the US.

Japan's Foreign Policy Speech on FOIP. Japan's Foreign Minister Toshimitsu Motegi delivered a policy speech titled "Shaping the Future of Japan-Africa Relations through a Free and Open Indo-Pacific" in Kenya on May 03<sup>84</sup>. Covering the Japan's updated FOIP policy, he said it was essential for countries to acquire resilience and the capability to ensure free choice to maintain a free and open international order. Japan would work with them to provide necessary support and cooperation. The core principles that underpin FOIP - freedom, openness, diversity, inclusiveness and the rule of law remain unchanged. The updated FOIP would focus on initiative such as strengthening the resilience of supply chains for critical materials as well as new economic infrastructure for the age of AI and data; achieve economic growth through

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<sup>81</sup> Japan-Philippines Summit Meeting and Dinner (Summary), May 28, 2026, <https://japan.kantei.go.jp/105/diplomatic/202605/28philippines.html>

<sup>82</sup> Japan-Philippines Joint Statement on the Comprehensive Strategic Partnership: "Weaving the Future Together: Peace, Prosperity, Possibilities", May 28, 2026, [https://japan.kantei.go.jp/contents/topics/23508\\_ext\\_20\\_1.pdf](https://japan.kantei.go.jp/contents/topics/23508_ext_20_1.pdf)

<sup>83</sup> Foreign Ministry Spokesperson Mao Ning's Regular Press Conference on May 29, 2026, [https://www.fmprc.gov.cn/eng/xw/fyrbt/lxjzh/202605/t20260529\\_11921368.html](https://www.fmprc.gov.cn/eng/xw/fyrbt/lxjzh/202605/t20260529_11921368.html)

<sup>84</sup> Shaping the Future of Japan-Africa Relations through a Free and Open Indo-Pacific, May 3, 2026, <https://www.mofa.go.jp/files/101023058.pdf>

public – private cooperation to address social challenges; and enhance capabilities and strengthen cooperation in the security domain. Japan would also prioritise enhancing connectivity and developing rules to promote free trade and investment, so as to provide further opportunities for peace and prosperity across the African continent. He then explained the three pillars of Japan's diplomacy towards Africa as active engagement in peace and stability, creating synergies between the growth of Africa and Japan; and empowering young generation co-creation.

Indian Ocean Dialogue. India hosted the 10th edition of the Indian Ocean Dialogue in New Delhi on May 07–08 under the theme "Indian Ocean Region in a Transforming World"<sup>85</sup>. The dialogue was organised by MEA in conjunction with ICWA and IORA and brought together senior officials, policymakers, scholars and experts from IORA Member States and Dialogue Partners to deliberate on key regional developments and emerging challenges in the Indian Ocean Region.

IOS Sagar. IOS Sagar (INS Sunayna) returned to Kochi<sup>86</sup> on May 20 after its goodwill visits to Southeast and South Asia. The ship visited Yangon<sup>87</sup>, Chattogram<sup>88</sup> and Colombo<sup>89</sup> during the month. The deployment, undertaken by India in pursuance of SAGAR and MAHASAGAR with Bangladesh, Indonesia, Kenya, Malaysia, Mauritius, Maldives, Mozambique, Myanmar, Seychelles, Singapore, South Africa, Sri Lanka, Tanzania, Thailand, Timor Leste and the UAE is of the most comprehensive multinational operational engagements conducted in the Indian Ocean Region.

South Korea Announces Plan to Build Nuclear Attack Submarines. South Korea's Ministry of National Defense announced the basic plan for development of nuclear attack submarines on May 26<sup>90</sup>. The submarine, to be built indigenously and using indigenously technology, will use low enriched uranium as fuel. The first SSN is expected to be launched in the mid-2030s and to enter service towards the end-2030s. South Korea also announced its firm position of not developing nuclear weapons.

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<sup>85</sup> 10<sup>th</sup> Indian Ocean Dialogue (May 07-08, 2026), May 08, 2026, <https://www.mea.gov.in/press-releases.htm?dtl/41118/10th+Indian+Ocean+Dialogue+May+0708+2026>

<sup>86</sup> IOS Sagar (INS Sunayna) Returns to Kochi After a Landmark Deployment, May 20, 2026, <https://www.pib.gov.in/PressReleasePage.aspx?PRID=2263352&reg=3&lang=1>

<sup>87</sup> Indian Ocean Ship Sagar Arrives at Yangon, Myanmar, May 05, 2026, <https://www.pib.gov.in/PressReleasePage.aspx?PRID=2258206&reg=3&lang=1>

<sup>88</sup> IOS Sagar Arrives at Chattogram, Bangladesh During Multinational Deployment, May 09, 2026, <https://www.pib.gov.in/PressReleasePage.aspx?PRID=2259442&reg=3&lang=1>

<sup>89</sup> IOS Sagar Makes Port Call at Colombo, Furthering India-Sri Lanka Maritime Cooperation, May 15, 2026, <https://www.pib.gov.in/PressReleasePage.aspx?PRID=2261567&reg=3&lang=1>

<sup>90</sup> South Korea Unveils Historic Plan to Build First Nuclear-Powered Submarine, May 26, 2026, <https://www.navalnews.com/naval-news/2026/05/south-korea-unveils-historic-plan-to-build-first-nuclear-powered-submarine/>

China Cuts Off Japan from Rare Earths. In a repeat of 2010, China is reported to have cut Japan off from rare earths and other materials for at least the last four months<sup>91</sup>, coinciding with the dispute between the two countries over Prime Minister Takaichi's remarks about Taiwan. According to Chinese Customs data, exports of rare earth minerals like dysprosium, terbium and yttrium oxide, as well as speciality metal gallium, to Japan have virtually stopped. Japan's Trade Minister Ryosei Akazawa and Chinese Commerce Minister Wang Wentao discussed the issue briefly on May 22<sup>92</sup>, on the sidelines of the APEC Ministers Responsible for Trade Meeting at Suzhou.

Mathew Wale Elected Prime Minister of Solomon Islands. Former opposition leader Mathew Wale was elected Prime Minister of Solomon Islands on May 15<sup>93</sup>, replacing former Prime Minister Jeremiah Manele who was ousted in a parliamentary vote on May 7. Wale was a staunch critic of the 2022 security agreement between China and the Solomon Islands, but his stance has moderated after visiting Beijing in 2025. China is deeply integrated into the Solomon Islands through infrastructure investment, policing assistance, telecommunications and political engagement.

Impeachment of Philippines Vice President Sara Duterte. Philippines Vice President Sara Duterte was impeached by the Philippine House of Representatives for the second time on May 11<sup>94</sup>. The charges against her include misuse of public funds, assassination threats, unreported wealth and abuse of power. The Philippine senate has convened an impeachment court and set in place the process to commence her trial on July 06, 2026.

Transfer of Italian Aircraft Carrier to Indonesia. Italy's parliament is reported to have approved the donation of the retired aircraft carrier Giuseppe Garibaldi to Indonesia<sup>95</sup>. Indonesia wants the ship largely for non-combat operations, including humanitarian missions, disaster relief, and patrolling its vast archipelagic sea lanes. The Italian government is also seeking to finalise the sale of submarines and aircraft worth €1.5 billion (\$1.76 billion) to Indonesia.

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<sup>91</sup> Solomon Cefai, "China squeezes Japan over rare earths in repeat of 2010 showdown", May 22, 2026, <https://www.reuters.com/world/asia-pacific/china-squeezes-japan-over-rare-earth-repeat-2010-showdown-2026-05-22/>

<sup>92</sup> Yoshiaki Nohara, "Japan trade minister holds brief talks with Chinese counterpart amid diplomatic row", May 24, 2026, <https://www.japantimes.co.jp/news/2026/05/24/japan/politics/japan-trade-minister-talks-china/>

<sup>93</sup> Kelly Ng, "Former China hawk elected Solomon Islands' leader", May 15, 2026, <https://www.bbc.com/news/articles/cd6p3v8eyglo>

<sup>94</sup> Philippine VP Sara Duterte impeached for a second time, May 11, 2026, <https://www.bbc.com/news/articles/cqlp21q4yq4o>

<sup>95</sup> Peter Suci, "Indonesia Might End Up with Italy's Retired Aircraft Carrier After all", May 1, 2026, <https://nationalinterest.org/blog/buzz/indonesia-might-end-up-with-italys-retired-aircraft-carrier-after-all-ps-043026>

CNS Visit to Myanmar. Admiral DK Tripathi, India's Chief of the Naval Staff, visited Myanmar from May 02-05 to deepen bilateral navy-to-navy cooperation, strengthen maritime security in the Bay of Bengal and support India's MAHASAGAR initiative<sup>96</sup>. He handed over some India provided equipment to the Myanmar Navy and strengthened training initiatives including the continued deployment of Indian Mobile Training Teams.

Delivery of Mahendragiri. Mahendragiri, the sixth Project 17A frigate and the last one to be built by Mazagon Dock Shipbuilders Limited (MDL), was delivered to the Indian Navy at Mumbai on April 30<sup>97</sup>. This brings to an end the current frigate construction programme at MDL. The destroyer construction programme at MDL had ended in January 2025 with the commissioning of INS Surat. The Request for Proposals (RFP) for the follow-on Project 17B frigate programme is still awaited, while the follow-on Project 18 destroyer programme has not yet received Acceptance of Necessity from the Defence Acquisition Council. The only warships of frigate size and above currently under construction are Vindhya giri, by GRSE, and Tripud and Tavasya, by GSL. All are expected to be delivered by 2027.

FMS Sale to India. The US State Department accorded approval on May 18 for the FMS sale to India of sustainment support for M777A2 Ultra-Light Howitzers at an estimated total cost of \$230 million<sup>98</sup>, and follow-on support services for Apache helicopters at an estimated cost of \$198.2 million<sup>99</sup>. The announcement was made a week before Secretary of State Marco Rubio arrived in India for a visit, including the Quad Foreign Ministers' Meeting.

Greenfield Shipyard in Gulf of Mannar. South Korea's HD Hyundai group has proposed building a greenfield shipyard with an annual capacity of 4 million tonnes annually at Thoothukudi, in the Gulf of Mannar<sup>100</sup>. Hyundai has also offered the HDF6000 frigate to the Indian Navy. The offer comes shortly after Japan offered the Mogami-class frigate to India.

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<sup>96</sup> Chief of the Naval Staff Visit to Myanmar, May 02, 2026, <https://www.pib.gov.in/PressReleasePage.aspx?PRID=2257454&reg=3&lang=1>

<sup>97</sup> Delivery of Project 17A Advanced Stealth Frigate 'Mahendragiri', May 01, 2026, <https://www.pib.gov.in/PressReleasePage.aspx?PRID=2257237&reg=3&lang=1>

<sup>98</sup> India - Sustainment Support for M777A2 Ultra-Light Howitzers, May 18, 2026, <https://www.state.gov/releases/bureau-of-political-military-affairs/2026/05/india-sustainment-support-for-m777a2-ultra-light-howitzers/>

<sup>99</sup> India - Apache Helicopters Follow-on Support, May 18, 2026, <https://www.state.gov/releases/bureau-of-political-military-affairs/2026/05/india-apache-helicopters-follow-on-support/>

<sup>100</sup> South Korea's HD Hyundai Pitches \$4B Thoothukudi Shipyard and HD6000 Frigates to Indian Navy Amid Japan's Mogami Offer, May 05, 2026, <https://defence.in/threads/south-koreas-hd-hyundai-pitches-4b-thoothukudi-shipyard-and-hd6000-frigates-to-indian-navy-amid-japans-mogami-offer.17661/>

Pakistan Commissions PNS Hangor. PNS Hangor, the first of the Hangor-class submarines built by the China Shipbuilding Industry Corporation, was commissioned at Sanya on April 30, 2026<sup>101</sup>. Pakistan's President Asif Ali Zardari was the Chief Guest, while the Pak Navy Chief, Admiral Naveed Ashraf was present, indicating the importance Pakistan attaches to the programme. Pakistan has ordered eight of these submarines, the first four to be built by CSIC, and the remainder by Karachi Shipyard & Engineering Works (KSEW). The submarines have a Stirling-powered Air Independent Propulsion (AIP) system and are believed to carry Babur-3 SLCMs.

India Cambodia Military Exercise. The India Cambodia bilateral military exercise CINBAX-II 2026 took place in Cambodia from May 04-17<sup>102</sup>. The exercise focused on company level joint training for operations in a sub-conventional environment.

US Counterterrorism Strategy. The US Counterterrorism Strategy was published on May 06<sup>103</sup>. The strategy recognised that a new type of domestic terrorism has emerged, driven by violent extremists who have adopted ideologies antithetical to freedom and the American way of life. It identifies three major types of terror groups: narco-terrorists and transnational gangs, legacy Islamic terrorists, and violent Left-Wing Extremists, including Anarchists and Anti-Fascists. It prioritises the neutralisation of hemispheric terror threats by incapacitating cartel operations until these groups are incapable of bringing their drugs, members and trafficked victims into the United States. Second priority is the targeting and destruction of the top five Islamist terror groups capable of executing operations against the US, including the Al Qaeda and ISIS. The stated objective is to identify terror actors and plots before they happen, cut off their arms, funding and recruitment streams, and ultimately destroy established terror groups. Regional priorities for counterterrorism are, in sequence, the Western Hemisphere, the Middle East, Europe, Africa, with Asia as the lowest priority. Pakistan as a source of terrorism does not find mention. This will impact US counterterror cooperation with India.

US Shipbuilding Plan 2026. The US Navy Shipbuilding Plan 2026 was released on May 11<sup>104</sup>. The plan seeks to change how the USN does business, enhance maritime dominance and revitalise the industrial base. It acknowledges that the USN currently operates 291 battle force ships, whereas the requirement by law is 355.

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<sup>101</sup> Pakistan Navy Commissions First Hangor-class Submarine in China, April 30, 2026, <https://www.navalnews.com/naval-news/2026/04/pakistan-navy-commissions-first-hangor-class-submarine-in-china/>

<sup>102</sup> Indian Army Contingent Departs for India-Cambodia Bilateral Military Exercise CINBAX-II 2026, May 03, 2026, <https://www.pib.gov.in/PressReleasePage.aspx?PRID=2257604&reg=3&lang=1>

<sup>103</sup> United States Counterterrorism Strategy, May 06, 2026, <https://www.whitehouse.gov/wp-content/uploads/2026/05/2026-USCT-Strategy-1.pdf>

<sup>104</sup> US Navy Shipbuilding Plan, May 2026, <https://media.defense.gov/2026/May/11/2003928909/-1/-1/1/NAVY%20SHIPBUILDING%20PLAN%20MAY%202026.PDF>

Shangri-la Dialogue. The 23<sup>rd</sup> edition of the Shangri-la Dialogue got underway in Singapore on May 29. The keynote address was delivered by Vietnamese President To Lam<sup>105</sup>. The dialogue featured an address by US Secretary of War Pete Hegseth on the US strategy for peace in the Indo-Pacific, in which he noted that while the US does not seek dominance over China but remains clear-eyed about China's burgeoning military capability<sup>106</sup>. He highlighted that the Pacific remained America's strategic priority, where the US seeks to achieve a lasting and favourable balance of power. US actions would now be based on actions rather than rhetoric, directed towards building a strong denial defence that ensures aggression is infeasible, escalation unattractive and war deemed irrational. He demanded an end to the era of freeloading and that allies increase their defence spending to at least 3.5% of their GDP. He singled out South Korea, the Philippines, Japan and Australia for their actions in sharing the burden, while observing there was room for Japan to do more. He specifically lauded India for assuming security responsibilities in the Indian Ocean as well as its steps to strengthen its defence industrial base.

Appointments. The Government of India appointed Lt Gen NS Raja Subramani (Retd), currently Military Adviser in the National Security Council Secretariat, as the next Chief of Defence Staff, to take over on May 30, 2026<sup>107</sup>. It also appointed V Adm Krishna Swaminathan, currently the Flag Officer Commanding in Chief Western Naval Command, to take over as the Chief of Naval Staff on May 31, 2026<sup>108</sup>.

INS Sudarshini. India's sail training ship INS Sudarshini made the trans-Atlantic crossing during the month, calling at Mindelo, Cape Verde from May 04-08<sup>109</sup>, and then at Antigua on May 27<sup>110</sup>.

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<sup>105</sup> Speaker Agenda, UUSS Shangri-La dialogue 2026, <https://www.iiss.org/events/shangri-la-dialogue/shangri-la-dialogue-2026/speaker-agenda/>

<sup>106</sup> United States' Strategy for Peace in the Indo-Pacific, May 30, 2026, <https://www.iiss.org/events/shangri-la-dialogue/shangri-la-dialogue-2026/plenary-sessions/first-plenary/>

<sup>107</sup> Lt Gen NS Raja Subramani (Retd) appointed as Chief of Defence Staff, May 09, 2026, <https://www.pib.gov.in/PressReleasePage.aspx?PRID=2259242&reg=3&lang=1>

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