

Welcome to This Week's Edition of Asia on the Horizon

Greetings, readers!

This week's issue takes you through a wide array of critical developments shaping the Indo-Pacific and Asia-Pacific regions. From ASEAN's evolving defense frameworks addressing traditional and climate-induced threats to the United States' strategic pivot in maritime security, the region remains at the epicenter of dynamic geopolitical shifts. Alongside this, emerging advancements in technology and defense, such as China's unveiling of the J-35 stealth fighter and key trilateral initiatives between Japan, South Korea, and the United States, reflect an accelerating race for strategic dominance.

We also delve into pivotal diplomatic milestones, including the evolving UK-China relationship post-G20, and Taiwan's call for deeper economic ties with the EU amid growing authoritarian challenges. At the same time, the resilience of global undersea communication infrastructure comes under scrutiny following recent disruptions in the Baltic.

As these narratives unfold, *Asia on the Horizon* continues to provide you with the insights and context needed to navigate the complexities of this vibrant and ever-transforming region. Let's dive in!



1. KEY DEVELOPMENTS

Reflections on the G20 Summit in Rio

The 19th G20 Summit, themed “Building a Just World and a Sustainable Planet,” featured milestones such as the African Union’s inclusion and a global alliance against hunger. However, lingering questions about actionable commitments and member unity remain as global challenges intensify.

UK-China Relations Reset at G20

At the G20 Summit in Rio, UK Prime Minister Keir Starmer met Chinese President Xi Jinping for the first time since 2018. Both leaders committed to “consistent, durable, and respectful” relations, focusing on trade, clean energy, and global challenges like climate change. However, tensions remain over human rights and China’s military ties with Russia, posing challenges to a genuine reset.

Damaged Undersea Cables Spark Concern in the Baltic

On November 19, 2024, the Danish Navy detained the Chinese vessel *Yi Peng 3* for suspected involvement in damaging critical undersea telecom cables connecting Finland, Germany, Sweden, and Lithuania. The damaged cables, C-Lion1 (Finland-Germany) and BCS (Sweden-Lithuania), have raised significant concerns over Europe’s critical infrastructure security. This incident follows similar disruptions, such as the *NewNew Polar Bear’s* incident involving the Baltconnector gas pipeline in 2023. Germany and Finland emphasized the need for heightened vigilance and multinational cooperation to safeguard Europe’s strategic assets amidst growing hybrid threats.

ASEAN’s Strategic Focus on Security and Climate

The 18th ASEAN Defence Ministers’ Meeting (ADMM) and the 11th ADMM-Plus in Lao PDR emphasized resilience against traditional and non-traditional threats. Highlights included the Vientiane Joint Declaration and a focus on climate-related disaster resilience. Informal dialogues with defense leaders from the U.S. and China underscored ASEAN’s central role in fostering regional stability amid geopolitical uncertainties.

EU Tightens Trade Policies with China

The European Union announced new subsidy rules requiring Chinese firms to transfer technology to European partners for sustainable technology grants. This move aligns with stricter trade policies, including tariffs on Chinese electric vehicles, reflecting the EU’s efforts to strengthen its industrial base while countering China’s influence.

Japan, South Korea, and U.S. Forge Trilateral Progress

On November 15, 2024, Japan, South Korea, and the United States issued a joint statement highlighting significant advancements in their trilateral partnership since

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the 2023 Camp David Summit. A new Trilateral Secretariat was established to coordinate and implement shared commitments, signaling an enduring alignment in defense, economic, and technological cooperation. The leaders condemned North Korea's decision to deploy troops to Russia, pledged enhanced missile defense, and underscored the need for a rules-based order in the Indo-Pacific.

Taiwan Calls for EU Economic Partnership

Speaking at the Taiwan-EU Investment Forum on November 18, 2024, President Lai Ching-te advocated for an economic partnership agreement with the European Union. Lai emphasized the need to build resilient global semiconductor supply chains while countering authoritarianism. Taiwan's collaboration with the EU, anchored by investments like TSMC's chip plant in Germany, reflects its strategic role in bolstering democratic economies.

U.S. Launches Maritime Security Consortium

The Department of Defense unveiled the Maritime Security (MARSEC) Consortium on November 18, 2024, aimed at addressing Southeast Asia's pressing maritime security challenges. With an annual budget of \$95 million, the initiative focuses on advancing maritime domain awareness, logistics, and sustainment through cost-effective, commercially available solutions.

China Showcases J-35A Stealth Fighter

At the Zhuhai Airshow 2024, China debuted its J-35A stealth fighter, a twin-engine aircraft complementing the J-20. As the second nation to field two stealth jet models, China aims to solidify its air power in the Asia-Pacific, sparking debates about a potential arms race.

Japan Hosts Five Eyes Meeting

For the first time, the Five Eyes intelligence alliance convened in Japan, emphasizing Tokyo's critical role in gathering intelligence on China. This development highlights Japan's efforts to deepen its integration with Western security frameworks while navigating the complexities of its regional engagements.

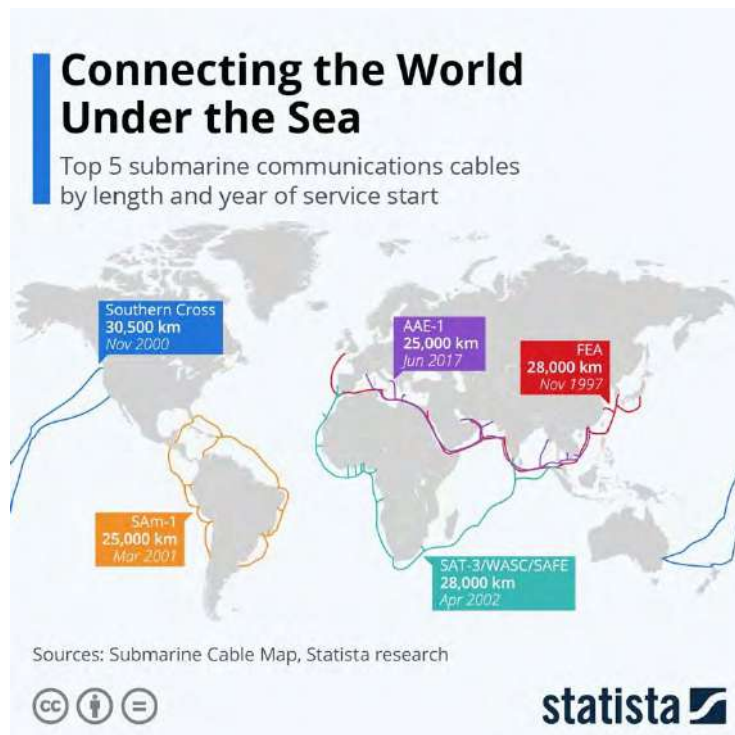
2. STATISTICS OF THE WEEK

The Backbone of Global Connectivity

The global economy and communication infrastructure rely heavily on undersea cables, which carry an estimated 95% of international data traffic. This week's featured infographic highlights the **top five submarine communications cables** by length and their year of service inception, showcasing their critical role in connecting continents and enabling seamless digital interaction.

- **Southern Cross (30,500 km):** Operational since November 2000, this cable connects Australasia to the Americas.
- **FEA (28,000 km):** Active since 1997, it bridges Europe and Asia.
- **SAT-3/WASC/SAFE (28,000 km):** Serving since April 2002, this cable links Africa, Europe, and Asia.
- **SAm-1 (25,000 km):** In service since March 2001, it connects the Americas.
- **AAE-1 (25,000 km):** A more recent addition, active since June 2017, linking Asia, Africa, and Europe.

These submarine cables are essential to global trade, finance, and communication. However, recent incidents like the suspected sabotage of undersea cables in the Baltic Sea underline the vulnerabilities in this infrastructure. As these cables represent a lifeline for economies and security, their protection becomes increasingly vital in today's interconnected world.



<https://www.statista.com/chart/25580/the-longest-submarine-communications-cables/>

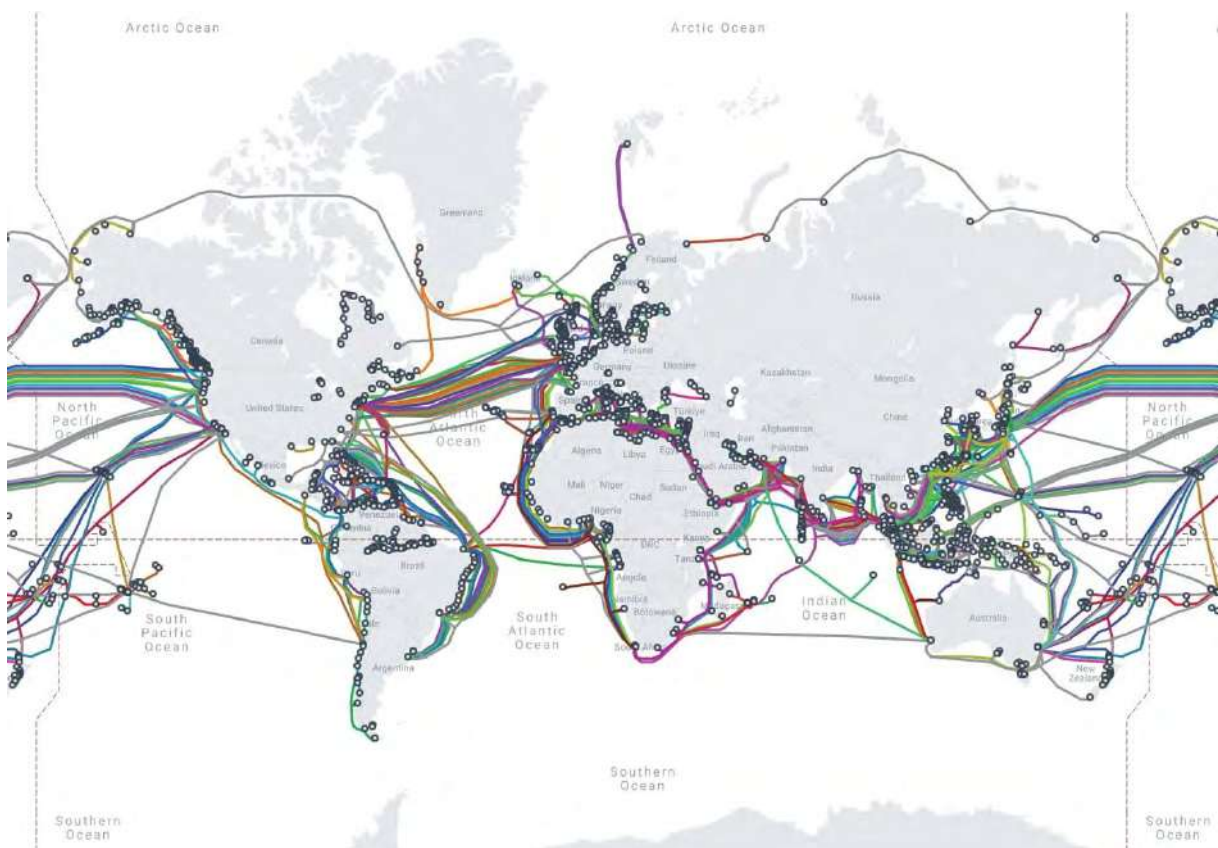
3. MAP OF THE WEEK

A Vulnerable Web Beneath the Wave

This week's map underscores the intricate network of undersea cables—critical lifelines for global communication and economic exchange. These submarine cables enable the seamless transmission of internet data, banking transactions, and defense communications, making them indispensable in our interconnected world.

Recent events have highlighted the fragility of this infrastructure. On November 19, the Danish Navy detained the Chinese vessel *Yi Peng 3* in the Danish Straits, suspected of damaging vital cables, including the C-Lion1 (Finland-Germany) and BCS (Sweden-Lithuania). This incident is not isolated, echoing the sabotage of the Baltconnector gas pipeline in 2023.

The geopolitical implications are profound. The targeting of infrastructure in the Baltic Sea—a region critical to European connectivity—underscores the need for enhanced international vigilance. As investigations continue, calls for greater cooperation to safeguard these underwater arteries grow louder, reminding us of the stakes in protecting this unseen yet vital global network.



<https://www.submarinecablemap.com>

4. PHOTO OF THE WEEK

Unity in Defense at ASEAN ADMM 2024

This week's photo captures the defense ministers of ASEAN nations and their partners standing united at the 18th ASEAN Defence Ministers' Meeting (ADMM) and 11th ADMM-Plus in Vientiane, Lao PDR, held from November 19-22, 2024. The gathering highlighted ASEAN's commitment to regional security, climate resilience, and defense cooperation amid rising geopolitical uncertainties.

The event underscored ASEAN's central role in fostering peace and stability, reinforced by key declarations and initiatives to address both traditional and non-traditional security threats. Leaders called for strengthened partnerships and regional collaboration, showcasing ASEAN's capacity to navigate challenges in a turbulent Indo-Pacific landscape.



5. INFOGRAPHIC OF THE WEEK

China's New Stealth Fighter – The J-35

This week, our spotlight turns to the J-35, China's second fifth-generation stealth fighter jet unveiled at the Zhuhai Airshow 2024. The J-35 is poised to complement the J-20 "Mighty Dragon," establishing China as the only nation after the United States to field two stealth fighter models.

Key Features:

- **Stealth Design:** With a low radar cross-section, the J-35 enhances survivability in contested airspaces.
- **Twin Engines:** Provide increased power and maneuverability.
- **Variants:** The air force-specific J-35A and the carrier-based J-35C, equipped with foldable wings for naval operations.

The J-35's design has ignited global debates, drawing comparisons to the U.S. F-35 Lightning II. Allegations of design similarities and accusations of intellectual property theft have been raised, although China denies these claims.

Strategically, the J-35 bolsters China's air power, particularly in the Indo-Pacific, as Beijing seeks to counterbalance U.S. dominance in advanced fighter technology. The J-35's deployment signifies China's ambitions to expand its influence in both land-based and maritime domains.



6. REGIONAL ALLIANCES

ASEAN's Evolving Defense Framework

The 18th ASEAN Defense Ministers' Meeting (ADMM) and the 11th ADMM-Plus, held on November 20–21, 2024, in Vientiane, Lao PDR, underscored ASEAN's growing emphasis on integrating traditional and non-traditional security strategies to address the dynamic regional security landscape. These meetings, themed “ASEAN Together for Peace, Security and Resilience” and “Resilience to Climate-Related and Other Natural Disasters,” marked significant milestones in strengthening ASEAN's collective defense mechanisms and balancing great power competition.

Strengthening Regional Unity and Peace

The Vientiane Joint Declaration on Peace, Security, and Resilience reaffirmed ASEAN's role as a pillar of regional stability. Amid rising geopolitical tensions, particularly in the South China Sea, member states emphasized adherence to international law, such as the 1982 UNCLOS, and the need to expedite the Code of Conduct negotiations with China. Acknowledging the urgency of these challenges, the declaration stressed the importance of ASEAN's unity and centrality as a neutral mediator in the Indo-Pacific.

Addressing Non-Traditional Threats: Climate and Security

For the first time, the ADMM-Plus integrated climate resilience as a core security priority. The adoption of the Joint Statement on Resilience to Climate-Related Disasters marked a shift in ASEAN's defense agenda, highlighting measures like capacity-building initiatives, infrastructure resilience, and regional knowledge-sharing to mitigate the impacts of climate-induced threats. This reflects ASEAN's acknowledgment of the interconnected nature of environmental challenges and security risks.

Engaging External Powers

ASEAN successfully navigated its relationships with major external partners, particularly the United States and China, during these meetings. U.S. Defense Secretary emphasized enhancing maritime, cyber, and air domain awareness, while China's Admiral Dong Jun focused on maritime security cooperation and avoiding “bloc politics.” These engagements highlighted ASEAN's skillful balancing act, leveraging its centrality to facilitate dialogue and avoid being drawn into great power rivalries.

Challenges and Opportunities

While ASEAN's consensus-driven model promotes inclusivity, it often limits decisive action. Divergent member state priorities and varying capacities hinder effective implementation of regional initiatives, particularly in contentious areas like the South China Sea. Moreover, ASEAN's approach to climate resilience requires robust funding mechanisms and clearer timelines to ensure tangible outcomes.

Looking Ahead

As ASEAN transitions its chairmanship to Malaysia in 2025, the bloc faces the dual challenge of maintaining its centrality and enhancing its institutional coherence. The meetings in

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Vientiane laid a foundation for addressing these issues, reaffirming ASEAN's role as a cornerstone of peace and stability in Southeast Asia.

7. ANALYSIS

The U.S. Maritime Security Consortium – A Strategic Maritime Pivot

The launch of the Maritime Security (MARSEC) Consortium by the U.S. Department of Defense marks a decisive step in addressing Southeast Asia's maritime security vulnerabilities amid rising geopolitical tensions in the Indo-Pacific. This initiative, unveiled on November 18, 2024, signals Washington's commitment to strengthening partnerships in a region where maritime disputes, economic dependencies, and strategic rivalries intersect.

Key Objectives and Strategic Vision

With an annual budget of \$95 million, the MARSEC Consortium aims to enhance maritime domain awareness, logistics, and sustainment capabilities for Southeast Asian partners. By prioritizing cost-effective and commercially available solutions, the initiative is designed to address immediate operational challenges faced by nations in the region, many of which lack advanced maritime capabilities. Key lines of effort include:

- **Improving Maritime Domain Awareness (MDA):** Empowering regional navies and coast guards with tools to monitor and secure their maritime territories effectively.
- **Promoting Logistics and Sustainment:** Building capacity to ensure long-term operational efficiency.
- **Multilateral Exercises:** Expanding technology demonstrations in regional exercises, such as *Balikatan*, to improve interoperability and showcase innovative solutions.

Strategic Timing and Regional Implications

The MARSEC Consortium comes at a critical juncture. Southeast Asia is a focal point for great-power competition, where disputes in the South China Sea and coercive maritime activities by China threaten regional stability. Over 60% of global maritime trade transits through these waters, underscoring their economic and strategic significance. By investing in the maritime security of its regional partners, the United States aims to:

1. **Counterbalance China's Influence:** Providing tangible security benefits positions the U.S. as a reliable partner for Southeast Asian nations, countering China's growing dominance through infrastructure investments under the Belt and Road Initiative.
2. **Bolster Regional Resilience:** Enhancing the maritime security capabilities of ASEAN states aligns with U.S. efforts to foster a free and open Indo-Pacific.
3. **Reinforce Multilateralism:** By promoting collaborative approaches, the U.S. supports ASEAN centrality, reinforcing regional unity against external coercion.

Challenges and Opportunities

While the MARSEC Consortium reflects U.S. strategic intent, its success depends on overcoming several challenges:

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- **Political Sensitivities:** Southeast Asian nations often seek to avoid choosing sides in U.S.-China competition. The consortium must ensure its initiatives are framed as region-centric rather than as tools for great-power rivalry.
- **Implementation Barriers:** Effective execution requires alignment with the specific needs and capacities of diverse partners, from larger players like Indonesia to smaller nations such as Brunei.
- **Sustainable Engagement:** Long-term success will depend on consistent funding and the ability to integrate commercial solutions seamlessly into regional frameworks.

At the same time, the initiative presents significant opportunities:

- **Innovation and Collaboration:** The focus on commercially available solutions fosters innovation and encourages public-private partnerships.
- **Trust-Building:** Transparent and inclusive engagements can strengthen trust among regional partners, further solidifying U.S. influence.

Conclusion

The MARSEC Consortium underscores the U.S.'s commitment to safeguarding one of the world's most critical maritime regions. By aligning its strategic goals with the region's needs, Washington has the opportunity to enhance maritime security, deter coercive actions, and reinforce the rules-based international order. However, success will require balancing assertive leadership with respect for Southeast Asia's nuanced geopolitical dynamics. As the initiative unfolds, it will serve as a litmus test for the United States' ability to navigate the complexities of Indo-Pacific security while fostering sustainable and equitable partnerships.

