



Delhi Policy Group

Advancing India's Rise as a Leading Power



EAST ASIA EXPLORER MAY 2026

Authors

Pradeep Taneja
Divya Rai
Jayantika Rao T.V.



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Core 5A, 1st Floor, India Habitat Centre, Lodhi Road, New Delhi- 110003

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EAST ASIA EXPLORER

This monthly publication tracks evolving geopolitical trends, emerging security challenges, regional institutions, and India's relations with East and South East Asia and is authored by our research team led by Amb. Biren Nanda, Senior Fellow for Act East Diplomacy. Your comments and feedback may be addressed to the author at biren.nanda@dpg.org.in. To subscribe, please [click here](#).

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Cover Images:

1. Japan's Defense Minister Koizumi held a trilateral defence meeting with Deputy Prime Minister and Minister for Defence of Australia, Richard Marles and Minister of Defence of New Zealand, Chris Penk on the sidelines of the Shangri La Dialogue on May 30, 2026. Source: [Ministry of Defence Japan](#)
2. The leaders of ASEAN member states convened for the 48th ASEAN Summit and Related Meetings, in Cebu, Philippines, on May 8, 2026. Source: [ASEAN](#)
3. Indian Prime Minister met President of the Socialist Republic of Vietnam, To Lam, at Hyderabad House, in New Delhi on May 06, 2026. Source: [Prime Minister of India](#)

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Australia-Japan Defence and Security Relations Gather Speed

by

Pradeep Taneja

The defence ministers of Australia and Japan, Richard Marles and Shinjiro Koizumi, met on May 30, on the sidelines of the Shangri-la Dialogue in Singapore. Their discussions covered bilateral and multilateral security agreements. But there was also an unprecedented trilateral engagement when New Zealand defence minister, Chris Penk, joined his Australian and Japanese counterparts to discuss New Zealand's potential acquisition of Japan's upgraded Mogami-class frigates, which Australia has already committed to buying.

The growing defence and security cooperation between Australia and Japan is often couched in terms of maintaining a Free and Open Indo-Pacific by the two governments. As the northern and southern anchors of the United States' alliance system in the Pacific, Japan and Australia had been gradually increasing their defence and security cooperation since 2007, when they issued the Joint Declaration on Security Cooperation. But the pace of such cooperation has picked up in recent years for a variety of reasons, which will be discussed later in this article.

Let us first examine the extent of the defence and security cooperation between the two self-described middle powers and close US allies. Upgrading their bilateral relationship to a Special Strategic Partnership in 2014, the two countries have signed multiple agreements in the past few years. The Japan-Australia Reciprocal Access Agreement (RAA), signed in 2022, creates a status-of-forces legal framework for rapid military deployments in one another's territory. It was the first such agreement Japan had signed with any country outside the United States (later, Japan signed a similar but more limited RAA with the Philippines in July 2024). Since the signing of the RAA, Australia and the United States have encouraged Japanese participation in joint operations in northern Australia, where the US marines have been deployed on a rotational basis since 2011.

The Australian and Japanese forces have taken part in more than forty activities since the RAA was signed, including the largest ever participation by Japan's Self-Defence Forces in the Exercise Talisman Sabre 2025, held across Australia, in which over 1,500 Japanese personnel participated. From May 29 to July 3, forces from the US, Australia and Japan are taking part in Exercise Southern Jackaroo near Townsville in Australia's Queensland state. According to the [US military](#), the purpose of this year's exercise is "interoperability advancement", which will ensure that US, Australian and Japanese forces can operate as a unified force in any future crisis.

In fact, the US and Australian armed forces are increasingly participating in joint exercises with their Japanese counterparts. Historically, a bilateral drill between Japan Air Self-Defence Force and Royal Australian Air Force, the Exercise Bushido Guardian has from 2025 become a [trilateral exercise](#). Around 350 US Air Force personnel joined 300 of their Japanese and 100 Australian counterparts to practice integration of fifth-generation fighter capabilities in September-October 2025 at Misawa Air Base in Japan.

Australia and Japan have also begun cross deployments of F-35 fighter jets. In August 2023, for the first time, two Japanese F-35A Lightning IIs and 55 JASDF personnel were deployed to RAAF Base Tindal in Australia's Northern Territory, giving the Japanese Air Self-Defence Force the valuable experience of long-distance deployment. The following month, six RAAF F-35A Lightning IIs were deployed to Komatsu Air Base in Japan for Exercise Bushido Guardian.

Australia-Japan defence and security cooperation received a significant boost in August 2025 when the Australian government announced that it had awarded a [contract](#) to Japan's Mitsubishi Heavy Industries to supply new general-purpose frigates for the Royal Australian Navy. Australia has selected an upgraded version of MHI's Mogami-class frigate over Germany's Thyssenkrupp Marine Systems' design for its SEA 3000 general purpose frigate programme to replace the retiring ANZAC-class fleet. Under the deal, three of these ships will be supplied from Japan and the remaining eight will be built at Western Australia's Henderson shipyard.

Under Japan's post-war pacifist constitution, Japan was prohibited from exporting lethal military equipment. This is the first time that Japan will be exporting warships. Following her election as Japan's first female prime minister, Sanae Takaichi has [relaxed the rules](#), allowing sales of military equipment to other countries. Under the new rules announced on April 21, this year, Japanese companies will be able to export military equipment to at least 17 countries with which Japan has signed defence technology transfer agreements. But sales of lethal weapons will still be banned to countries that are actively engaged in armed conflict.

Several factors have contributed to the growing defence and security relations between Australia and Japan. First, China's growing military capabilities and its aggressive assertion of territorial claims has begun to change the regional balance of power, persuading middle powers like Australia and Japan to enhance their bilateral security cooperation as well as intensifying joint military exercises with each other and the United States.

Second, while the United States remains the critical major ally of both Australia and Japan, the recent erratic decision-making by the Trump administration that does not seem to distinguish between friend and foe when it comes to trade and tariffs,

has contributed to US allies fostering closer security and economic ties with each other as a form of self-help.

Finally, there is this [new element](#) of Australia-Japan 'strategic depth' and significant strategic complementarities between the two countries. Australia provides Japan with vast geographic space, such as the Woomera Test Range, where Japan can test its long-range missiles and rockets, unmanned systems and electronic warfare equipment that cannot be tested in densely populated Japan. Australia, on the other hand, will get access to advanced Japanese defence manufacturing technology.

While in Japan there is some unease about the relaxation of the country's tough defence export policies, in Australia there is considerable public support for enhanced defence cooperation with Japan. According to a survey by the US Studies Centre in Sydney in 2024, sixty per cent Australians would support a formal defence treaty with Japan.¹No wonder during her recent visit to Australia, Prime Minister Takaichi referred to Japan-Australia relationship as a 'Quasi Alliance'.

But as a [leading scholar](#) of Japanese politics and foreign policy recently pointed out, whether Takaichi will be able to sustain Japan's 'strategic activism' will depend on her ability to successfully navigate Japan's domestic politics and the unpredictable power shifts abroad. Regardless, Australia appears ready to boost defence and security ties with Japan.

¹ Quoted by Greg Sheridan, "Japan's 'iron lady' shows up weak Albanese", *The Australian*, 5 May 2026, page 11.

Pressure Points at ASEAN Summit 2026

by

Divya Rai

Introduction

The Philippines hosted the first of this year's two Association of Southeast Asian Nations (ASEAN) Summits in Cebu on May 7-8, 2026². The meeting happened at a difficult moment, with regional economies reeling from the fallout of instability in the Middle East and its knock-on effects on global energy markets. While several significant issues were on the table, the summit's headline outcomes were primarily focused on the Middle East crisis and tentative early steps toward reintegrating Myanmar into the regional fold following its controversial elections.

The Middle East Crisis as the Dominant Issue

The war in Iran dominated proceedings, pushing other long-standing concerns – including the South China Sea – to the margins. Southeast Asia finds itself particularly exposed to the near-total closure of the Strait of Hormuz. According to the Southeast Asia Energy Outlook 2024, the region relies on the Middle East, around 60 percent of its current oil imports comes from the region. The Iran war and disruption in the Strait of Hormuz have exposed how structurally dependent the region remains on distant and politically volatile energy sources. Across member states, governments have already resorted to emergency measures – shortened work weeks, remote work mandates, price subsidies, and consumption freezes – in an attempt to absorb the shock.³

Against this backdrop, for the first time in years, leaders openly discussed ideas once considered politically impossible: a shared regional petroleum reserve, coordinated fuel-sharing mechanisms, joint food and fertiliser stockpiles, and even a regional oil storage hub potentially hosted by Indonesia. Philippines, as this year's ASEAN chair, made the ratification of the ASEAN Framework Agreement on Petroleum Security (APSA) its central energy priority⁴. First conceived in the 1980s but never operationalised, APSA will establish regional fuel stockpiles to be drawn upon collectively during supply crises. President Ferdinand Marcos Jr. urged the

² ASEAN. Chair's statement of the 48th 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>

³ East Asia Forums. "Asia bears the brunt of the Hormuz crisis", May 14, 2026. <https://eastasiaforum.org/2026/05/14/asia-bears-the-brunt-of-the-hormuz-crisis/>

⁴ ASEAN. ASEAN leaders' statement on the response to the Middle East crisis, MAY 8, 2026. <https://asean.org/wp-content/uploads/2026/05/ASEAN-Leaders-Statement-on-the-Response-to-the-Middle-East-Crisis.pdf>

member states to complete the ratification process without further delay. In his opening address, Marcos struck a tone of cautious solidarity:

*“When circumstances are challenging, partnership is, more than ever, indispensable. And even when the future appears uncertain, hope remains the responsibility of leadership. For ASEAN has always drawn its strength not from uniformity, but from unity”.*⁵

The urgency is hard to overstate. With Brent crude surging past US \$120 per barrel, inflationary pressure has rippled through the region’s economies.⁶ APSA has been on the table for years, but full ratification has remained elusive as individual member states have dragged their feet. The current crisis may provide the political impetus that years of negotiations could not. Beyond the agreement itself, a broader strategic shift is needed. What the region needs is a shared diversification strategy – covering supply chains, food security, and mutual support mechanisms – rather than a continued ad hoc scramble. Although countries are already turning to the United States, Brunei, Libya, and Russia to compensate for reduced Gulf supplies, these efforts remain largely uncoordinated.

Myanmar: Cautious Engagement

Beyond energy, Myanmar remained the summit’s most intractable political issue. The country’s new civilian government – a product of elections widely seen as stage-managed by the military – has been signalling its willingness to engage constructively with ASEAN following years of isolation since the 2021 coup. ASEAN continues to block participation from Myanmar, including coup leader-turned-president Min Aung Hlaing, until the bloc’s Five-Point Consensus is meaningfully implemented. Interestingly, Myanmar sent a delegation to Cebu led by the Ministry of Foreign Affairs’ permanent secretary, U Hau Khan Sum,⁷ as senior political figures, in the hopes of improving its international standing.

ASEAN member states remain deeply divided on how far to extend engagement with Myanmar. Thailand has been the most vocal advocate for accepting the election results and normalising Myanmar’s participation in the grouping. On the other hand, countries like Indonesia, Malaysia, and the Philippines have all expressed hesitation about bringing Naypyidaw back into the fold while the civil

⁵ Presidents of the Philippines. “Remarks of President Ferdinand R. Marcos Jr. at the Opening Ceremony of the 48th ASEAN Summit and Related Meetings”, May 8, 2026. <https://pbbm.com.ph/speeches/remarks-of-president-ferdinand-r-marcos-jr-at-the-opening-ceremony-of-the-48th-asean-summit-and-related-meetings/>

⁶ Japan Times. “Why ASEAN chose silence amid the growing Gulf crisis”, May 17, 2026. <https://www.japantimes.co.jp/commentary/2026/05/17/world/asean-chose-silence-amid-gulf-crisis/>

⁷ Myanmar Ministry of Foreign Affairs. Myanmar delegation, led by the Permanent Secretary of the Ministry of Foreign Affairs attends the 48th ASEAN Summit and Related Meetings(10-5-2026, Cebu). <https://www.mofa.gov.mm/en/myanmar-delegation-led-by-permanent-secretary-of-the-ministry-of-foreignaffairs-attends-the-48th-asean-summit-and-related-meetings10-5-2026-cebu/>

war continues, and resistance forces control substantial territory.⁸ The Philippines specifically called for ASEAN's special envoy to be granted access to detained democracy leader Aung San Suu Kyi⁹. As a middle-ground outcome reflecting these competing positions, ASEAN Secretary-General Kao Kim Hourn announced that a virtual meeting between ASEAN foreign ministers and their Myanmar counterparts is expected in the near term¹⁰.

Thailand–Cambodia on the Sidelines

The Philippines also faces the task of addressing the Thai-Cambodian border row. Thai and Cambodian troops have remained deployed along their shared border following armed skirmishes in July and December of last year. In an effort to help ease tensions and restart diplomatic engagement, Philippines arranged a three-way meeting involving President Ferdinand Marcos Jr and leaders from both Thailand and Cambodia after months without engagement.¹¹ As Thai and Cambodian troops remain stationed at the border following skirmishes in July and December last year. Both leaders announced they had agreed to pursue trust-building measures and establish a lasting truce.

The South China Sea Code of Conduct

Finalising a Code of Conduct (COC) for the South China Sea had been set as a flagship ambition for the Philippines' ASEAN chairmanship, with 2026 nominally targeted as the year for completing negotiations¹²; competing territorial claims and geopolitical tensions continue to complicate efforts toward a binding agreement. However, the core positions – particularly between China and the Philippines – remain far apart, and the prospect of a substantive, binding agreement in the near term looks increasingly remote. With the energy crisis in the forefront, the goal of COC for the South China Sea has taken a back seat. A finalised and meaningful COC under the current conditions remains unlikely.

⁸ South China Morning Post. ASEAN explores 'tentative' Myanmar re-engagement with virtual talks. May 12, 2026. <https://www.scmp.com/week-asia/politics/article/3353268/asean-explores-tentative-myanmar-re-engagement-virtual-talks>

⁹ Reuters. Philippines urges Myanmar to grant ASEAN envoy access to Aung San Suu Kyi. May 6, 2026. <https://www.reuters.com/world/asia-pacific/philippines-urges-myanmar-grant-asean-envoy-access-aung-san-suu-kyi-2026-05-06/>

¹⁰ Reuters. ASEAN to hold talks soon with Myanmar foreign minister, secretary-general says. <https://www.reuters.com/world/asia-pacific/asean-hold-talks-soon-with-myanmar-foreign-minister-secretary-general-says-2026-05-07/>

¹¹ President of the Philippines. <https://pco.gov.ph/presidential-speech/statement-of-president-ferdinand-r-marcos-jr-during-the-press-conference-of-asean-leaders-from-cambodia-the-philippines-and-thailand/>

¹² The diplomat. Philippines Hoping to Conclude South China Sea Code of Conduct in 2026. November 18, 2025. <https://thedi diplomat.com/2025/11/philippines-hoping-to-conclude-south-china-sea-code-of-conduct-in-2026/>

Conclusion

The Cebu summit laid bare a tension that has always sat at the heart of ASEAN's design. The bloc was built to prevent coercion between sovereign states, not to demand collective sacrifice for collective resilience. Its consensus-based approach excels at managing friction and avoiding open conflict. But it struggles with problems that require hard enforcement, resource redistribution, or rapid centralised decision-making.

The energy shock has exposed that limitation in real time. Governments across the region are relearning a lesson Europe absorbed after Russia's invasion of Ukraine: energy dependence is never purely an economic matter. It becomes political leverage, social instability, and strategic vulnerability simultaneously. A prolonged supply crisis could trigger cascading political consequences – subsidy crises, inflation spirals, weakened governments, and intensified external influence operations by major powers eager to exploit divisions. The real test now is whether ASEAN can turn their statements into practical action and use this crisis to build a more credible collective agenda to respond to emergencies.

Shared Vision, Strategic Depth: The India–Vietnam Enhanced Comprehensive Partnership

by

Jayantika Rao T.V.

Vietnamese President and Communist Party Chief To Lam embarked on a landmark three-day State Visit to India on May 5-7 – his first since assuming Vietnam’s two highest offices following the 14th National Party Congress. The visit carries weighty political symbolism, coinciding with the 10th anniversary of the India-Vietnam Comprehensive Strategic Partnership. Over the past decade, ties between the two nations have not only expanded but matured into a dynamic, multifaceted framework of cooperation, now resulting in the elevation of ties.

President Lam began his journey in Gaya, Bihar, before arriving in New Delhi for high-level engagements. On May 5, he met with National Security Adviser Ajit Doval to explore fresh avenues for strengthening bilateral cooperation. The following day, he sat down with Prime Minister Narendra Modi for a pivotal review of the relationship’s transformation across key pillars – from political engagement and defence cooperation to development partnerships, people-to-people ties, and trade.

Since the launch of the Comprehensive Strategic Partnership in 2016, bilateral trade has nearly doubled – rising from US\$ 10.1 billion in 2016–17 to US\$ 18.2 billion in 2025–26.¹³ This economic surge reflects the broader trajectory of cooperation, which has consistently moved forward across sectors. Building on this momentum, both leaders agreed to elevate the partnership to an *Enhanced Comprehensive Strategic Partnership* guided by spirit of “Shared Vision, Strategic Convergence, and Substantive Cooperation.”¹⁴

In his policy lecture at the Indian Council of World Affairs (ICWA), President Lam captured the essence of this framework by emphasising that the two nations “are facing the paradoxes of our time: the need for cooperation grows greater, yet trust is wearing thin. Economic structures are more deeply interconnected, yet are more vulnerable. Technologies are leaping ahead yet are deepening the development gap between nations. Changes are creating immense challenges, but above all they also open up opportunities for the taking if we can grasp them at the right time, and

¹³ “Total Trade with Vietnam Soc. Rep.”. Ministry of Commerce and Industry, Retrieved on May 15, 2026. https://tradestat.commerce.gov.in/eidb/country_wise_trade

¹⁴ “Joint Statement on Enhanced Comprehensive Strategic Partnership between the Republic of India and the Socialist Republic of Vietnam (May 06, 2026)”. Ministry of External Affairs, India, May 6, 2026. https://www.mea.gov.in/bilateral-documents.htm?dtl/41108/Joint_Statement_on_Enhanced_Comprehensive_Strategic_Partnership_between_the_Republic_of_India_and_the_Socialist_Republic_of_Vietnam_May_06_2026

opportunities shall multiply if we are linked together.”¹⁵ This new framework is designed to seize those opportunities. It will unleash untapped potential, reinforce and deepen strategic trust, broaden avenues for connectivity, and intensify developmental linkages. At its core, it aims to accelerate cooperation in science, innovation, and strategic technologies – ensuring that India and Vietnam not only navigate the challenges of our time but also harness them to shape a more resilient and forward-looking partnership.

In their joint statement¹⁶, Prime Minister Modi and President Lam laid out a bold, future-oriented vision for the India–Vietnam partnership. The leaders reaffirmed their commitment to strengthening traditional pillars of cooperation while opening new frontiers in innovation, critical and emerging technologies, renewable energy, health care, space exploration, digital public infrastructure, fintech, and pharmaceuticals. To capture the untapped potential of their economic ties, they set an ambitious new trade target of US\$ 25 billion by 2030. Prime Minister Modi emphasised that this next-generation economic engagement will be driven by deeper pharmaceutical collaboration, expanded agricultural trade, and a modernised ASEAN–India Trade in Goods Agreement (AITIGA) to inject fresh momentum into regional trade and investment. Both sides also pledged to prioritise supply chain stability, infrastructure development, and stronger cooperation between financial institutions. New initiatives in minerals, rare earths, and energy are expected to bolster economic security and enhance resilience in both nations’ supply chains.

Defence cooperation, meanwhile, continues to stand as the “strategic pillar”¹⁷ of the partnership. The leaders agreed to intensify collaboration across both traditional and emerging domains – from defence policy dialogues, joint exercises, and staff talks to joint research, co-production of new defence technologies, and enhanced port calls by naval vessels and air force aircraft. They also highlighted cooperation in peacekeeping, information sharing, hydrography, defence exhibitions, capacity building, maritime security, and search-and-rescue operations. These efforts, rooted in mutual priorities, will contribute to greater stability across the wider Indo-Pacific.

¹⁵ “56th Sapru House Lecture by H.E. Mr. To Lam, General Secretary of the Central Committee of the Communist Party of Viet Nam, President of the Socialist Republic of Viet Nam on “India-Viet Nam Comprehensive Strategic Partnership in the New Era: Shared Vision, Strategic Convergence, Substantive Cooperation,” ICWA, May 6, 2026. <https://www.icwa.in/>

¹⁶ Joint Statement on Enhanced Comprehensive Strategic Partnership between the Republic of India and the Socialist Republic of Vietnam (May 06, 2026)”. Ministry of External Affairs, India, May 6, 2026. <https://www.mea.gov.in/bilateral-documents>

¹⁷ “56th Sapru House Lecture by H.E. Mr. To Lam, General Secretary of the Central Committee of the Communist Party of Viet Nam, President of the Socialist Republic of Viet Nam on “India-Viet Nam Comprehensive Strategic Partnership in the New Era: Shared Vision, Strategic Convergence, Substantive Cooperation,” ICWA, May 6, 2026. <https://www.icwa.in/>

Looking ahead, both nations anticipate the establishment of a Strategic Diplomacy-Defence Dialogue (2+2), underscoring the growing depth of their defence partnership. On the sidelines, while it was not mentioned during any joint statement or press release, there is growing debate around the possible shipment of BrahMos supersonic cruise missiles¹⁸, which further highlights a shift in deterrence calculations in the South China Sea – moving from capacity-building to capability enhancement and signalling a new phase in regional security dynamics.

Vietnam's network of Comprehensive Strategic Partnerships (CSPs) serves as the backbone of its distinctive 'Bamboo Diplomacy' in an era of multipolarity and shifting global alignments. By strategically recalibrating its foreign policy, Vietnam has established CSPs with 14 countries as of May 2026, underscoring its determination to cultivate multifaceted ties that balance economic growth, political sovereignty, and strategic flexibility amid a complex geopolitical landscape.

Yet not all CSPs are created equal. While most of Vietnam's partnerships remain at the "normal" CSP level—broad but less sharply defined—the country has elevated its relationship with India to an enhanced CSP, the only one of its kind so far. This distinction signals a deeper, more institutionalised commitment that goes beyond the standard framework, setting India apart within Vietnam's diplomatic architecture. Other CSPs, though important, lack the same clarity of scope and strategic depth.

The rarity of such elevation is further underscored by Vietnam's April 17, 2026, announcement with China to "deepen the Comprehensive Strategic Cooperative Partnership."¹⁹ Even this phrasing, however, does not carry the same formalised weight as the enhanced CSP with India. In effect, Vietnam's partnership with India stands as the most advanced and clearly articulated among its network, marking a deliberate choice to prioritize and define this relationship more explicitly than others.

The upgrade of Vietnam-India relation signals a broadening of bilateral cooperation beyond traditional diplomacy and defence into trade, investment, technology, and connectivity. The agreement reflects both countries' efforts to diversify economic ties and build greater resilience amid shifting global supply chains and geopolitical uncertainty. However, looking ahead the trajectory of India-Vietnam ties will depend on the ability of both sides to translate strategic intent into operational outcomes.

¹⁸ Sharma, Saurabh. India may discuss BrahMos missile sale to Vietnam during presidential visit, sources say". Reuters, May 5, 2026. <https://www.reuters.com/world/asia-pacific/india-may-discuss-brahmos-missile-sale-vietnam-during-presidential-visit-sources-2026-05-05/>

¹⁹ "Vietnam's top leader To Lam to visit China from April 14 to 17". The State Council - The People's Republic of India, April 9, 2026. https://english.www.gov.cn/news/202604/09/content_WS69d73bbdc6d00ca5f9a0a4db.html



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India

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