

Reading the tea leaves

In history, defining moments like 9/11 that can be identified as markers of change are rare. More often, there are trend lines of slow-moving geopolitical changes which come together at a particular moment in time resulting in an inflexion point. Reading the tea leaves indicates that 2017 may well be the year which marked the reordering of the Asian strategic landscape.

The two slow moving trend lines clearly discernible since the Cold War ended a quarter century ago are the shift of the geopolitical centre of gravity from the Euro-Atlantic to the Indo-Pacific region and the rise of China. The U.S. 'rebalancing' announced in 2011 was a belated recognition of these changes, driven home by the impact of the 2008 financial crisis. Most of the rivalries are being played out in the crowded geopolitical space of the Indo-Pacific, and Asian economies now account for more than half of global GDP and becoming larger in coming years.

China's rise is reflected in a more assertive China. According to President Xi Jinping's 'two guides' policy announced in February, China should guide 'the shaping of the new world order' and safeguarding 'international security'. Much has changed during the last quarter century when Deng Xiaoping advised China 'to observe calmly, secure its position, hide its capability, bide its time and not claim leadership'.

Today's China is not just willing but eager to assume leadership and expects other countries to yield space. China has suggested 'a new type of great power relations' to the U.S. Its assertiveness in the East China Sea with Japan and in the South China Sea with its Association of Southeast Asian Nations (ASEAN) neighbours sends a signal that while multipolarity may be desirable in a global order, in Asia, China is the predominant power and must be treated as such.

Even though China has been a beneficiary of the U.S.-led global order, it is impatient that it does not enjoy a position that it feels it deserves, especially in the Bretton Woods institutions. During the last five years, it has set about creating a new set of institutions (the Asian Infrastructure Investment Bank and the New Development Bank) and launched the Belt and Road Initiative (BRI) to create a new trading infrastructure that reflects China's centrality as the largest trading nation.

The BRI is also complemented by a growing Chinese naval presence in the Indian Ocean. Beginning in 2009, the PLA Navy started rotating three ship task forces through the Indian Ocean as part of the anti-piracy task force off the Somalia coast. Visits by nuclear attack submarines to littoral ports began to take place. In addition to Gwadar, China is now converting the supply facility at Djibouti into a full-fledged military base.

Recent developments have accelerated these geopolitical trends. The first was the outcome of the U.S. elections last year. By invoking 'America first' repeatedly, President Donald Trump has made it clear that the U.S. considers the burden of leading the global order too onerous. American allies, particularly in the Asia-Pacific, are nervous about Mr. Trump's harangues that they are enjoying the benefits of the U.S. security umbrella on the cheap.

Recent nuclear and long-range missile tests by North Korea have added to South Korean and Japanese anxieties. Japan has been particularly rattled by the two missiles fired across Hokkaido. Given the U.S. push for more sanctions that depend on China for implementation, most Japanese reluctantly admit that North Korea's nuclear and missile capability is unlikely to be dismantled any time soon.

Another significant development was the Doklam stand-off between India and China that lasted from June to August. The Chinese playbook followed the established pattern — creating a

physical presence followed by sharpened rhetoric, together becoming an exercise in coercive diplomacy. This worked in pushing the nine-dash line in the South China Sea with the Philippines and Vietnam even as China built additional facilities on reclaimed land in the area. India, however, chose to block China and a few hundred soldiers on the plateau maintained their hostile postures even as Prime Minister Narendra Modi and President Xi attended the the G-20 summit in July amidst heightened rhetoric recalling the 1962 war.

Differences with China did not begin with Doklam. It was preceded by the stapled visa issue for Indians belonging to Arunachal Pradesh and Jammu and Kashmir, growing incidents of incursions along the disputed boundary, blocking of India's bid to join the Nuclear Suppliers Group last year, ensuring that no language relating to Pakistan-based terrorist groups found mention in the BRICS summit in Goa and preventing the inclusion of Masood Azhar from being designated as a terrorist by the UN Security Council by exercising a veto.

Since 1988, India has followed a consistent China policy based on putting aside the boundary dispute and developing other aspects of the relationship in the expectation that this would create mutual trust and enable a boundary settlement. However, the gap between India and China has grown, both in economic and military terms, and with it has emerged a more assertive China. The shared vision of an Asian century with a rising India and rising China is long past. Mr. Modi's personal diplomacy with Mr. Xi has had little influence on changing Chinese attitudes or behaviour. After Doklam, there is finally a consensus that the old China policy does not serve our national interests and a review is long overdue.

It is against this backdrop that Japanese Prime Minister Shinz Abe's visit to India took place last week. The contours of a new relationship were defined during Mr. Abe's earlier tenure, in 2006-07, when annual summits were introduced, the relationship became a 'Special Strategic and Global Partnership', Japan was invited to join in the Malabar naval exercises and a Joint Declaration on Security Cooperation was concluded. Since then, significant content has been added.

A singular achievement was the conclusion of the agreement for Cooperation in the Peaceful Uses of Nuclear Energy last year. Under negotiation for five years, this was a sensitive issue for Japan given the widespread anti-nuclear sentiment (though Japan enjoys the U.S. nuclear umbrella) and (misplaced) faith in the Nuclear Non-Proliferation Treaty; it would not have gone through but for Mr. Abe's personal commitment.

To deepen strategic understanding, the two sides initiated a 2+2 Dialogue involving the Foreign and Defence Ministries in 2010. A memorandum on enhancing defence and technology/security cooperation was signed and talks on acquiring the amphibious maritime surveillance ShinMaywa US-2i began in 2013. Trilateral dialogue involving both the U.S. and Japan and covering strategic issues was elevated to ministerial level in 2014. Japanese participation in the Malabar exercises, suspended because of Chinese protests, was restored in 2015. Once the agreement for the 12 US-2i aircraft is concluded with a follow-up acquisition as part of Make in India, the strategic relationship will begin to acquire critical mass.

However the strategic partnership needs stronger economic ties. Today, India-Japan trade languishes at around \$15 billion, a quarter of trade with China while Japan-China trade is around \$300 billion. Therefore, the primary focus during the recent visit has been on economic aspects. The Mumbai-Ahmedabad high speed rail corridor is more than symbolism, in demonstrating that high-cost Japanese technology is viable in developing countries and that India has the absorption capacity to master it. Completing it in five years is a management challenge but the bigger challenge will be to transfer the know-how of best practices to other sectors of the economy.

Another major initiative is the recently launched Asia-Africa Growth Corridor to build connectivity

for which Japan has committed \$30 billion and India \$10 billion. This adds a critical dimension to the 'global partnership' between the two countries. However, to make this productive, India needs to change its style of implementing projects abroad, most of which have been plagued by cost and time over-runs.

Ensuring effective implementation and setting up mechanisms for delivery will align Mr. Modi's Act East policy with Mr. Abe's Free and Open Indo-Pacific Strategy. This alignment sets the stage for the reordering of the Asian strategic landscape.

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