Diversifying Security in Southeast Asia: The Role of French Arm Transfers in Indonesia, Malaysia, and Singapore's Hedging Strategies

Colin, Bénédicte

Universiteit
Leiden
The Netherlands

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Bénédicte Colin
s4538730

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Supervisor: Dr. A.R. Shidiq

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Introduction

Southeast Asia's recent militarisation reflects a security shift following the intensification of great power competition between China and the United States in the region. The 2010s proved a decisive turning point: China's increased the pressure of its territorial claims with a rapid and large-scale transformation of disputed reefs and atolls, the 'nine-dash line', into militarised artificial islands, completed with airstrips, radar installations, and missile systems. In response, the United States announced its 'pivot to Asia' in 2011, a strategic rebalancing aimed to reaffirm influence in the region through naval patrols, freedom of navigation operations, the strengthening of alliances with traditional allies (Philippines and Japan), and renewed security cooperation with regional partners (Vietnam and Indonesia). China's growing assertiveness in the South China Sea alone triggered a wave of arms buildups in Southeast Asia which reshapes the region's geopolitical landscape. The broader implications of this militarisation are profound. The South China Sea has become a microcosm of great power competition, with overlapping alliances and rivalries creating a more uncertain security environment.

First in the line of militarisation is Indonesia, accounting for half of regional arm imports in 2024, followed by Singapore and Malaysia. These countries present very interesting study cases as they each traditionnally follow distinct strategic alignement: Malaysia leans more towards China, Singapore aligns more closely with the United States, and Indonesia positions itself in a middle ground. They also present different levels of economic development, with Singapore being a high-income economy, and Indonesia and Malaysia upper-middle-income economies, which impacts their arm procurement budget and domestic defence industry capacities.

Concomitant with the militarisation of Southeast Asia, France, the second world's arms supplier, recently reoriented its strategic focus toward the Indo-Pacific, as illustrated by French President Macron's visit to Southeast Asia in May 2025. This alignment of regional demand with French strategic supply presents new opportunities. As a non-aligned, extra-regional power with no territorial claims in Southeast Asia, France offers an attractive partnership for hedging. Its arms sales come with fewer political strings than those from the United States or China, and its Indo-Pacific strategy resonates with regional priorities for a rules-based order.

This thesis examines the determinants of arm supplier choice for for Indonesia, Malaysia, and Singapore, with a particular focus on why these countries are procuring weapons from France. We assume that countries buy weapons based on economic and strategic considerations. The French quality-price ratio remains similar to any competing country, yet on the expensive side: as an example, a French Rafale jet costs $125M, and its American counterpart the F-35 jet $109M (Mickeviciute, 2025). Hence, strategic factors seem to additionally support arm procurement from France. This thesis explores one key explanation: hedging, the strategic behaviour of a state in uncertain and risky contexts to avoid taking sides and to pursue opposite measures vis-à-vis competing powers to retain a fallback position.

The central question of this research is: To what extent is the diversification of arms supply and strategic partnerships by Indonesia, Malaysia, and Singapore with France driven by their hedging strategies?

Chapter 1 contextualises global and regional arms procurement trends, with a focus on French arms transfers to the three case study countries. This section presents global and regional arm procurement trends, and offer a focus on France's supply to our three case study countries. Southeast Asia remains a recipient in the arm transfers system, except for some niche export capabilities of Singapore. While the United-States has been the main arm supplier for Indonesia and Singapore, and Russia for Malaysia, France has emerged as a significant player in the region, becoming a relevant arm supplier for Indonesia, maintaining steady sales to Singapore, and engaging in selective deals with Malaysia.

Chapter 2 develops the analytical framework of this research, reviewing the litterature on the determinants of arm procurement and its role in hedging. Arm procurment is shaped by three needs: domestic security, economic growth, and influence, corresponding to security, economic, and political considerations. In Southeast Asia's uncertain geopolitical context, arms procurement serves as a tool for military hedging, minimising security risks by increasing armament and military alignment without directly targeting any power. This thesis complements the notion of military alignment with defense diplomacy, the cooperative use of military forces during peacetime. Indonesia, Malaysia, and Singapore all engage in hedging, adopting apparent contradictory economic and strategic partnerships with both the United States and China, while diversifying their

cooperation with other countries. The methodology of this research adopts a mixed-methods approach, and combines a quantitative analysis of French arm trade data and a qualitative close reading of key Defence Papers and policy documents.

Chapter 3 presents the analysis of this research, testing two indicators for military hedging: arm procurement and defence diplomacy. The first hypothesis examines deterrence hedging through arms procurement by assessing excessive standard deterrence, anti-access/area denial (A2/AD) procurement strategies, and a diversification of arm procurement away from the two big powers. The second hypothesis examines defiance hedging by analysing the correlation between arm procurement and defence diplomacy within enhanced military cooperation, technology transfers, and a political rhetoric faming France as a strategic partner.

Chapter 4 discusses the findings. Regarding deterrence hedging, only Singapore exceeds regional standard deterrence levels. The three countries present arm procurement patterns relevant to an A2/AD strategy, Singapore and Indonesia more conclusively that Malaysia. However, there is no clear signal of diversification of procurement away from the United-States. Regarding defiance hedging, the analysis reveals enhanced defence partnerships with France for Indonesia, limited but promising cooperation for Malaysia, and long-standing defence ties for Singapore. A correlation of arm procurement and military cooperation is identified. France also offers technology transfers as part of its arm deals, and is therefore primarily perceived as such by the three countries, rather than as "third way" alternative in the defense sector. Overall, the results align with existing literature on hedging, and questions skepticism regarding Indonesia and Malaysia's domestic defense industry capacities. The thesis concludes by acknowledging limitations related to language constraints, data access, and its qualitative methodology.

Chapter 1: Context

Global Trends

Since the early 21st century, global arms transfers have followed three key trends: a general increase in volume, a demand significantly going 'South', and a timid diversification of production outside traditional Western centers. Arms transfer increased by 49,5% between 2000 and 2024 (Figure 1 and 2), a rise usually associated with the proliferation of conflicts following the relative stability of the post-Cold War era and the aftermath of 9/11 (Mandle & Pearson, 2023).

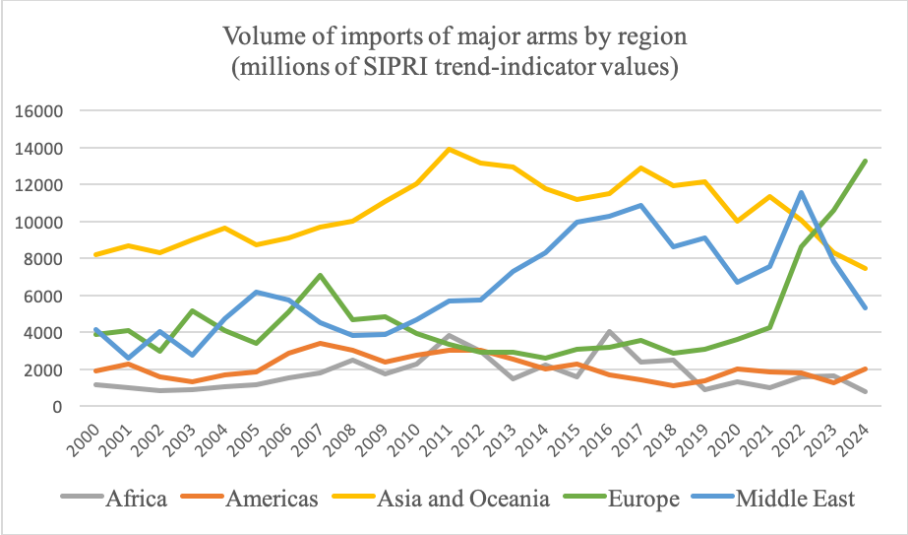


Figure 1
Source: SIPRI Arms Transfers Database, 2025.

Data on regional arm procurement reveals that arms imports remain concentrated in the 'Global South', with the Asia and Oceania region leading demand between 2000 and 2022, followed by the Middle East. Western countries reduced their military budgets in the aftermath of the 2007-2008 global financial crises (Mandle & Pearson, 2023). Recent fluctuations show a decrease of the 'Global South' demand starting around 2016-2017. Fluctuations may not necessary reflect a decrease of arm procurement, and could either be explained by the end of a cycle of militarisation, the growth of domestic arms industries, or the temporary economic impact of the COVID-19 pandemic. Concomitant with this decrease is a spike of European imports in 2021, likely due to rearmament efforts in response to the Ukraine war.

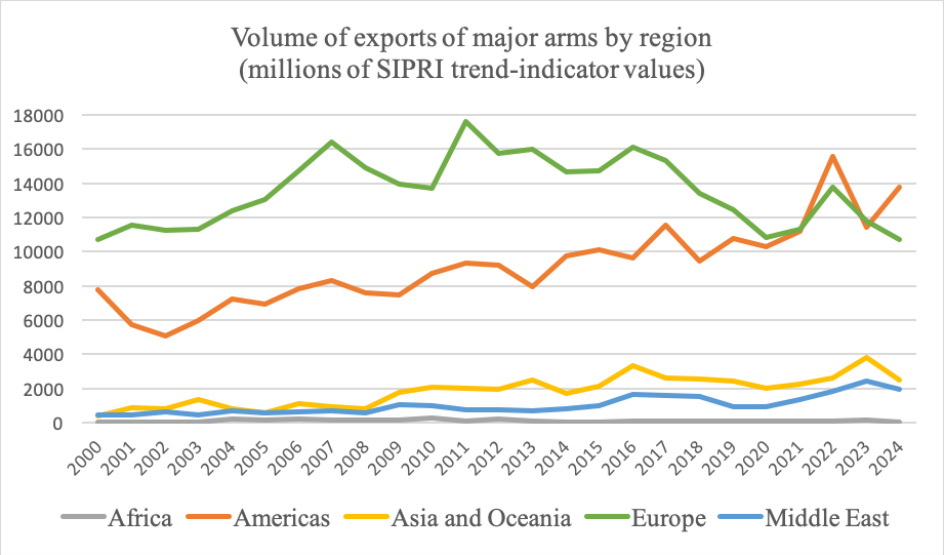


Figure 2
Source: SIPRI Arms Transfers Database, 2025.

Historically, arms production has been dominated by Europe and the United States, holding an overall stable share of 88.5% of the market between 2000 and 2024. However, Figure 2 shows a slight increase of production since 2008 from the Asia and Oceania and the Middle East regions, rising from 4.4% in 2000 to 15.3% in 2024 (11.5% for the 2000–2024 period). While this indicates a slow diversification of suppliers, the 'Global North' retains an oligopolistic position in arms manufacturing.

Regional Trends

Looking now into Asia, the largest arm recipients between 2000 and 2025 are, in order of importance, India, China, South Korea, Australia, and Pakistan (Figure 3). Among Southeast Asian nations, only Singapore and Indonesia rank in the top ten for the 2000-2025 period.

China dominates as the region's leading arms supplier, followed by South Korea, which has steadily expanded its market share over the past 25 years (Figure 4). Southeast Asia on its side lacks significant arms export capacity. Singapore is the sole regional exception, with *ST Engineering* ranking between 58th and 63rd in the global top 100 arms-producing companies since 2010 (SIPRI Arms Industry Database, December 2024). For the rest of Southeast Asia, domestic arms industries

do not meet global competition. Overall, Southeast Asia remains an arm recipient, except for some niche export capabilities of Singapore.

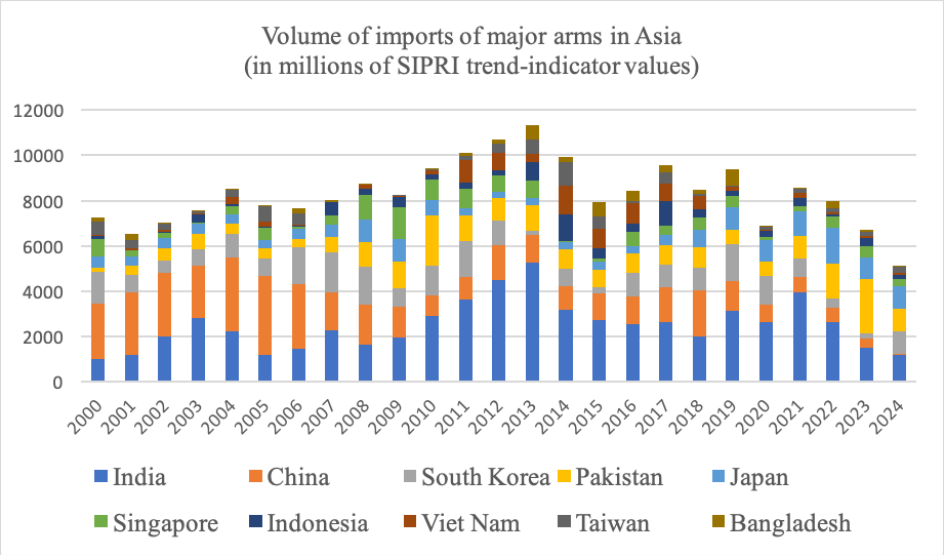


Figure 3
Source: SIPRI Arms Transfers Database, 2025.

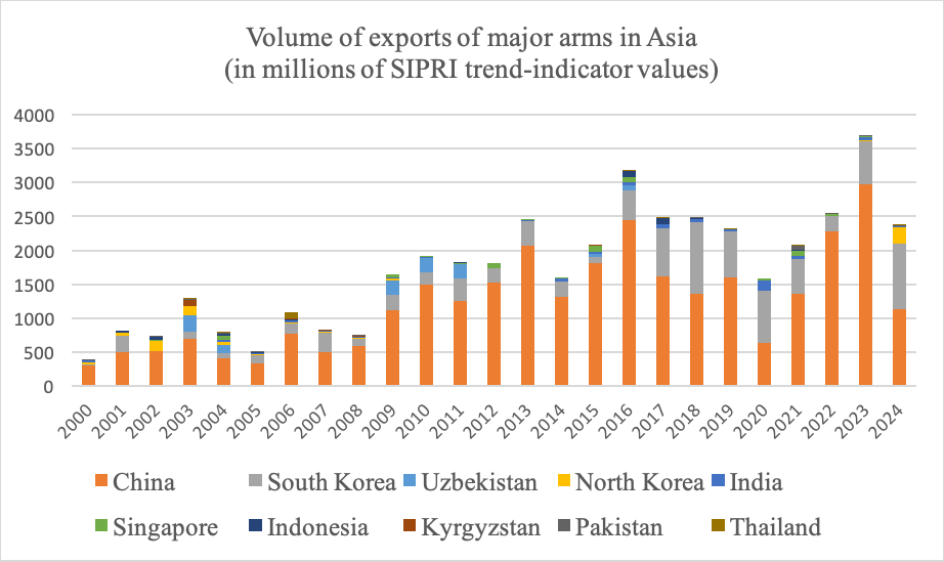


Figure 4
Source: SIPRI Arms Transfers Database, 2025.

French Arm Trade with Indonesia, Malaysia, and Singapore

To identify the arms suppliers for Indonesia, Malaysia, and Singapore, this study cross-referenced data from the top 20 global arms exporters with secondary sources (Ganesan, 2005; Balakrishnan, 2021; Mandle & Pearson, 2023)

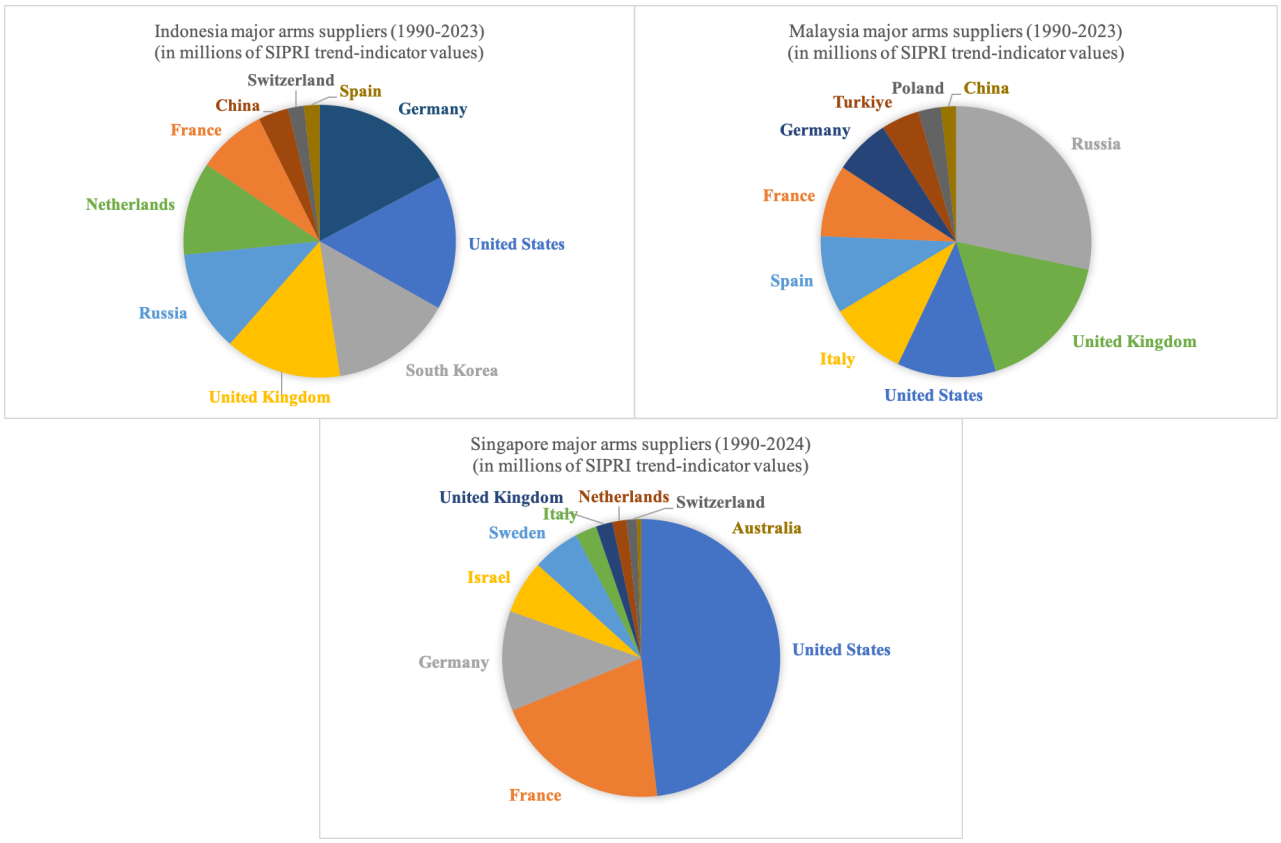
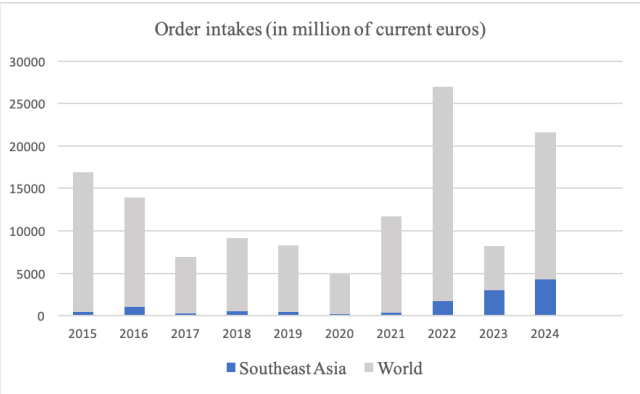


Figure 5
Source: SIPRI Arms Transfers Database, 2025.

The United States have been the first arm supplier for Indonesia and Singapore in the past 35 years, accounting for almost half of Singapore's imports and almost 1/5th of Indonesia's imports. Russia has been the leading supplier of Malaysia with almost 1/3rd of its arms imports (Figure 5).

France, though not the largest supplier, holds a non-negligeable position, ranking 7th for Indonesia, 6th for Malaysia, and 2nd for Singapore over the past 35 years. While Southeast Asia does not represent a major market for French arm imports, its share has grown in recent years (excluding the 2020-2021 drop linked to the COVID-19 crisis), reaching 9,4% of France's orders intake in 2024 (Figure 6). Facing fierce competition, France has been seeking new markets outside Europe. After the saturation of its arm deals with India, and following the cancellation of a deal with Australia in

2021, France now switched its attention to Southeast Asia, taking advantage of the decline in Russian arms exports in the region due to the Ukraine war. Singapore and Indonesia are the main regional importers of French arms, with Indonesia's share expected to rise following recent orders (Figure 7).



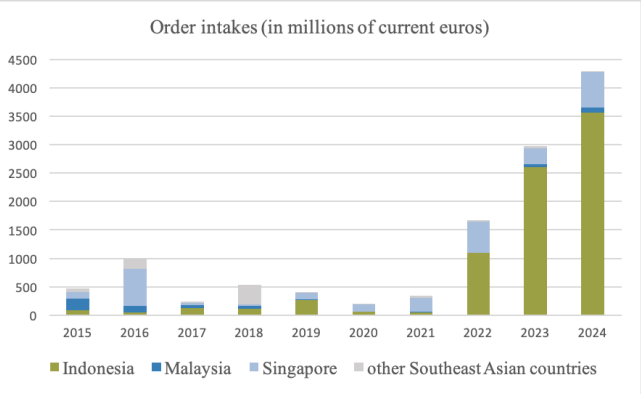


Figure 6 Figure 7

Source: Armed Forces Ministry Report to the French Parliament, 2025.

Figure 8 shows a consistent France share in Indonesia's arm procurement since the early 2000s, recurring high volume-value deals with Singapore, and a punctual high volume-value deal with Malaysia during the 2011-2014 period.

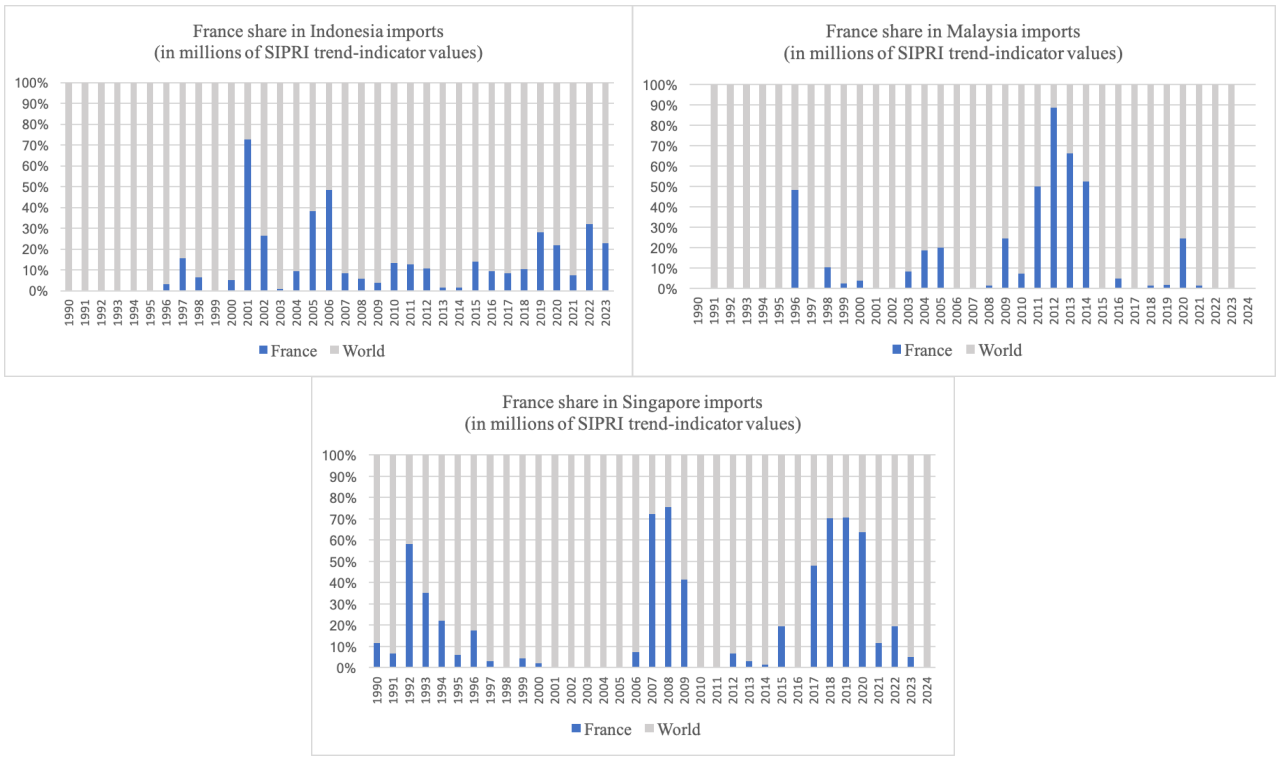


Figure 8

Source: SIPRI Arms Transfers Database, 2025.

In summary, France has expanded its arms transfers to the region, emerging as a relevant supplier for Indonesia, maintaining steady sales to Singapore, and engaging in selective deals with Malaysia. These observations set the stage for examining the determinants of arms procurement for these three countries.

Chapter 2: Analytical Framework

Litterature Review

Determinants of Arm Procurement

Why do countries acquire weapons? Based on realist lenses, states tend to undertake arms build-up or to align with major powers to safeguard national security. Krause (1992) identifies three core objectives for arm procurement: the pursuit of wealth, of power, and of victory in war. In the contemporary Southeast Asian context, Gindarsah (2016), Balakrishnan (2021), and Bitzinger (2023) further specify these goals as national security, socioeconomic prosperity (including technology transfers), and soft-power projection.

How do states decide whether to produce, purchase, or sell arms? Arms transfers are shaped by a balance between economy and security considerations, in addition to endognous political factors.
Economically, arms trade follows the global division of labour based on economic comparative advantages. According to Levine, Somnath, and Smith (1994), supply countries maximise economic returns and minimise future negative security externalities, while importing countries maximise security while minimising economic strains. On the side of the demand, Dunne, Garcia-Alonso, and Levine (2007) present a two-step process: first, establishing a defence base industry within budget constraints; second, evaluating the potential for technology transfers from arms import. However, since technology transfers very much depends on technological absorption capabilities, the absorption of advanced military technology often proves challenging for low- and middle-income economies, limiting the economic benefits of arms imports.
Yet, arms are not ordinary commodities, and carry strategic and national security implications. Pierre (1982) highlights the risks of dependency path for recipients, and on the contrary leverage opportunities for suppliers. Suppliers must also consider risks of a problematic end-use of exported weapons, and the loss of their technological edge in the case of technology transfers.
Arm procurement is also no foreign to politics, and can be used as a tool for political legitimation. It has been a traditional move for governments to invoke external security threats to rally domestic support (Kuik, 2021). Militarisation can also enhance a states international credibility and recognition as a global player.

From this literature, we consider three primary needs that condition arms procurement:

- Domestic security (security considerations)
- Economic growth (economic considerations)
- Influence (political considerations)

Economic considerations involve a sequential process to first secure minimal defense capabilities through an import/production trade-off; and second to pursue economic growth via technology transfers. Security considerations suppose to ensure secure supply chains, which then allows a country to have international influence. Finally, political considerations focus on both domestic legitimisation and international recognition.

Willis (2016) notes that, while the end of the Cold War put economic aspects in the foreground of suppliers' considerations compared to previous structures defined along security-based alignments, security considerations regained importance since 2001. This suggests that contemporary arms procurement is increasingly driven by strategic alignments rather than purely economic calculations.

Arm Procurement as a Tool of Hedging

Southeast-Asian countries navigate a specific geopolitical environment. Caught between two economic and strategic giants, China and the United States, trying to compete with them on the military level would be ridiculous. In realistic theory, countries that are not able to influence international relations are influenced. However, this does mean Southeast Asian countries are passive, they possess room for maneuver, or agency. A specific state behaviour in such geopolitical system is hedging. Kuik (2021) defines hedging as an insurance-seeking behaviour under conditions of high stakes and high uncertainty. Hedging entail three elements: not taking sides among competing powers; adopting counteracting measures to mitigate risks; and maintaining gains while cultivating a "fallback" position (Kuik & al., 2015). The aim is to acquire the maximum benefits from the different powers in a best-case scenario, while simultaneously securing a back-up plan in a worst-case scenario. Kuik distinguishes between heavy hedgers that have open defiance but selective deference with big powers, and light hedgers that have open deference but selective defiance. While deterrence entails a flexible approach of balancing engagement with the big power

while also adopting measures to mitigate potential risks, defiance on the contrary supposes a more offensive strategy of resisting pressures from the big power. Among the different domains of hedging (political, economic, and military), military hedging involves indirect balancing to minimise security risks without directly targeting any power, often by forging military alignement and increasing armament (Kuik & al., 2015).

Military alignement does not necessary imply formal alliance membership. It can also be understood within the frame of defence diplomacy, which entails a new form of cooperative use of military forces during peace time (IISS, 1999; Pierre, 1981; Hills, 2000). It includes bilateral or multilateral defence dialogues and agreements, joint exercices, and the use of the military for peacekeeping, humanitarian and disaster relief operations (Gindarsah, 2016). It is considered a low-cost and low-risk instrument for building amicable defence and security relations, particularly appealing to countries with limited state resources.

Southeast Asia's geopolitical context is suboptimal: both the United States and China are indispensable sources of support to achieve prosperity and security, yet both are also sources of uncertainty. Southeast Asian hedging thus acts to mitigate different risks: an increasingly aggressive China, an uncertain US long-term commitment, unpredictable US–China relations, and a possible big-power conflict (Kuik, 2021). For Indonesia, Malaysia, and Singapore, hedging is the best available strategy out of a second-best situation. They all engage in apparent contradictory economic and strategic partnerships with both the United States and China, in addition to diversifying their cooperation with third countries.

The three countries' hedging strategies differ due to the ways their foreign policy has been shaped by their historical experiences. Indonesia pursue a "free and active" foreign policy, embodied in the principles of "a million friends and zero enemies" (building regional cooperation through multilateralism) and the "dynamic equilibrium" (restraining the competition for dominance of big powers) (Roberts, 2015). This explains an in-between position between light and heavy hedging to minimise the two big powers intervention in the region (Kuik, Cheng-Chwee, & Rozman, 2015; Roberts, 2015). Malaysia's foreign policy is based on autonomy under the 'Middle Way' principle, diversifying partnerships, especially towards South–South and regionalism (Allès & al., 2019). Malaysia avoids direct confrontation with China, although it shows signs of relative distanciation

since the 2010s, and keeps its distance from the United States, despite also having longstanding defence ties (Lai, 2021). Singapore's foreign policy is essentially determined by a sense of 'innate vulnerability', a trauma from its survivalist period (Leifer, 2000; Ganesan, 2005), which explains a search for the active intervention of the big powers in the region, while remaining independent and neutral (Doyle & Rumley, 2019). Singapore presents the most enhanced cooperation with the United States, while simultaneously developing a pragmatic economic partnership with both the United States and China (Kuik, Cheng-Chwee, & Rozman, 2015; Lee, 2024). Malaysia presents the lightest hedging of the three countries, Indonesia a slightly more open defiance, and in recent years, Singapore has been the most enthusiastic in embracing the United-States rebalancing (Kuik, Cheng-Chwee, & Rozman, 2015; Lai, 2021).

The hedging policy adopted by Southeast Asian countries not only entails economic and strategic partnerships with the United States and China, but also includes a diversification of strategic partnerships with other actors in the region. This creates opportunities for countries like France, the only European residential country in Southeast Asia with its oversea territories in Mayotte, La Réunion, New Caledonia and French Polynesia. The country is military active in the region, with the deployment of 'sovereignty forces' in its overseas territories and vast EEZ and 'presence forces' stationed in countries with which it has defence agreements (Meijer, 2021). Based on its continuous call for autonomy from the United States, and its 'constructive opposition' to China (Meijer, 2021), France ambitions to become "third way" alternative to the Sino-American rivalry, '*a path of balance or stabilisation to avoid a a new Cold War in the Indo-Pacific region, where each country would have to choose between China and the United States'* (Senate of the French Republic, 2013). Through this policy of 'constructive ambiguity', France aims to balance different interests, and to be a relevant alternative strategic partner (French Defence Minitry, 2025 Strategic review).

This thesis investigate whether French arms procurement by Indonesia, Malaysia, and Singapore is driven by hedging strategies. To test this hypothesis, we must identify observable signals of hedging behaviours. Since hedging answers a context of uncertainty, states should undergo higher levels of investment into militarisation than regional average. One method to test this is to determine whether the militarisation efforts of Indonesia, Malaysia, and Singapore surpass the regional standard deterrence level. Hedging also involves a technological response to China's growing assertiveness in the region. This can be evaluated by analysing the adaptation of military systems towards Anti-

Access/Area-Denial (A2/AD) capabilities, designed to deny enemy forces access into a specific space or to make it extremely costly to operate within it (Figiaconi, 2023). Additionally, hedging strategies often aim to reduce dependency on big powers such as the United States and China, which can be observed through the diversification of arms suppliers in favour of third countries. Following lock-in effects inherent in supplier-recipient dynamics, arm procurement motivated by hedging is further correlated with the building trust relations and a relative strategic alignement. This can be tested by examining increased military cooperation and the inclusion of technological transfers into arm deals. Finally, hedging supposes the active political framing of the hedging policy itself, such as the promotion of countries like France as a strategic partners, which can be identified through the use of hedging language in official defense documents.

These elements can be sum up into two hypotheses adressing two types of hedging: deterrence and defiance.

Hypothesis 1: Deterrence hedging through arm procurement. French arms procurement answers a defensive reaction to China's assertiveness in the region and to uncertainty regarding the United States as strategic partner. Deterrence hedging is evidenced by accelerated militarisation that exceeds standard deterrence, an adaptation of weapons systems to China with the aquisition of A2/AD capabilities, and a deliberate diversification of suppliers away from the United States.

Hypothesis 2: Defiance hedging through defence diplomacy. French arms procurement reflects an active defence diplomacy, signaling independence or resistance to pressure from big powers. Defiance hedging is visible through the correlation between arm procurement and military cooperation with France, which includes the multiplication of joint exercices, the inclusion of technology transfers within arm transfer deals, and the explicit framing of France as a strategic partner.

Methodology

This thesis adopts a mixed-methods approach, combining quantitative and qualitative analysis to examine the dynamics of arms trade and strategic alignment with France.

The quantitative component focuses on arms trade data between 1990 and 2024 between the three case study countries and France, primarily sourced from the Stockholm International Peace Research Institute (SIPRI) Arms Transfers Database. The analysis will assess global, regional and country-by-country arm procurement trends, with a particular attention to volume, value, and type of weapon systems, all broken down by supplying countries. Additionally, military expenditure data will be analysed to assess whether arm procurement patterns exceeds the regional standard deterrence. When it comes to the limits of our quantitative analysis, data gaps can be identified, as the defence industry remains a highly sensitive sector, with cases of missing or classified data. Given the scarcity of alternative sources, this study relies on SIPRI data, supplemented by French arms export statistics.

The qualitative component evaluates strategic alignment through an analysis of government documents to assess how the four countries apprehend and present their strategic partnerships. The data collection covers the period from 2000 to 2025 and includes defence white papers, official press releases, Ministry of defence and Ministry of foreign affairs statements, Parliamentary debates and transcripts, state visit communiqués, and defence cooperation agreements. Documents are sourced from France, Malaysia, Indonesia, and Singapore, with analysis conducted in both French and English.

The research will use the methodology of close reading for several key Defence White Papers. According to Herman and Vervaeck (2019), close reading allows to distinguish between *story* (the event), *narrative* (the organisation of events: plot, time, causality, structure), and *narration* (the act of telling). Ohrvik (2024) situates close reading as an active analytic practice with a deliberate act of attentiveness. In the field of security studies, Campbell (1992) demonstrates that foreign policy and security practices are not merely responses to objective external threats, but are are discursively produced through language, representation, and imagery. This study applies close reading to identify narratives of hedging and strategic partnerships with France, focusing on key discursive

markers: hedging ("diversification," "strategic autonomy," "balancing," "risk") and strategic alignment **(**"shared values," "common threats," "partnership,"). The analysis will compare possible pre- and post-2010 narratives to trace shifts in discourse and assess each country's perception of its relationship with France. Below the list of policy documents:

- Indonesia 2003 Defence White Paper "Indonesia: Defending the Country Entering the 21st Century"
- Indonesia 2015 Defence White Paper
- Malaysia 2010 Ministry of Defence Annual Report
- Malaysia 2020 Defence White Paper "A Secure, Sovereign and Prosperous Malaysia"
- Singapore 2000 Defence White Paper 'Defending Singapore in the 21st Century'
- Singapore "Total Defence" Official Website
- France 2025 National strategic review

As this study is conducted by a French student based in the Netherlands, it is important to acknowledge the potential for Western-centric bias in the interpretation of Southeast Asia's reasons for arms procurement. It introduces a risk of confirmation bias, especially in the assessment of France's role as a strategic partner in Southeast Asia. This reflexivity is essential to maintaining analytical rigour throughout the research process.

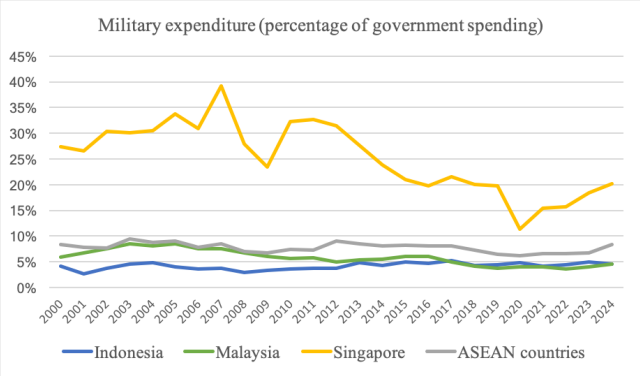
Chapter 3: Analysis

Hypothesis 1: Deterrence Hedging Through Arm Procurement

This chapter evaluates the hypothesis that Indonesia, Malaysia, and Singapore arm procurement of French weapons reflects a strategy of deterrence hedging, i.e., efforts by Southeast Asian states to mitigate risks associated with China's growing assertiveness and the uncertainty about the long-term United States' security commitment. To test this hypothesis, the analysis examines three indicators: whether arms procurement exceeds regional standard deterrence, aligns with an Anti-Access/Area Denial (A2/AD) posture in response to Chinese military capabilities, and diversifies away from dependence on the United States and China.

Military Standard Deterrence

Deterrence refers to the traditional Cold War–era model in which states prevent adversaries from taking aggressive actions by threatening credible military retaliation (Schelling, 1966). In this study, standard deterrence is defined as the regional average for military expenditure in Southeast Asia.



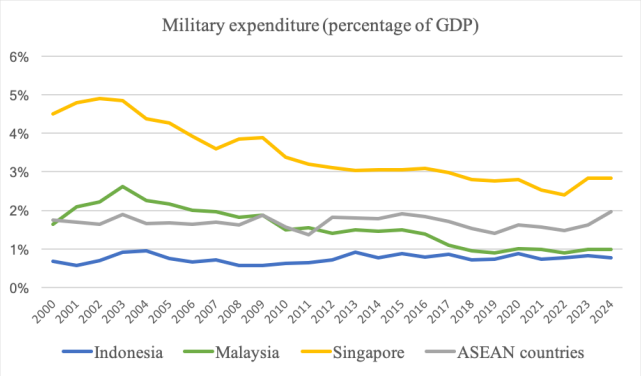


Figure 9 *Figure 10*

SIPRI Military Expenditure Database, 2025.

In 2024, military expenditure in Indonesia accounted for 1% of Indonesia's GDP and 5% of government spending, with spending levels remaining stable over the past 25 years (Figure 8 and 9). Indonesia has prioritised military modernisation and the development of its indigenous defence industrial base (Roberts, 2015; Gindarsah, 2016). Under President Joko Widodo (2014-2024),

Indonesia aimed to obtain a ‘minimum essential force’, a force structure with indispensable military capabilities and an adequate level of operational readiness. Reforms included organisational restructuring, the ‘right-sizing’ policy of military units for specific missions, and arm modernisation programmes, as most of the weapon systems were outdated (Roberts, 2015). As an example, Indonesian military still uses French AMX-13 battle tanks, produced in 1953 (Nababan, 2023). President Prabowo Subianto (2015-present) has continued the focus on military modernisation with the renewal of ageing equipment and a diversification of suppliers.

Malaysia maintains the fourth-largest military in ASEAN, with 2024 defense spending accounting for 1% of GDP and 5% of government expenditure (Figure 8 and 9). While spending was stable until the 2010s, it subsequently declined from 2.5% to 1% of GDP. Defence procurement presents challenges realted to limited threat assessment expertise, poor understanding of life-cycle costs and compatibility during systems integration processes, in addition to systemic issues of over-dependence on governement, corruption and low technological absorption capability (Balakrishnan, 2021). Despite investment in offsets, Malaysia’s defence industry sector has not really taken off and still very much depends on foreign suppliers.

Singapore allocated 3% of its GDP and 20% of its government spending to military expenditure in 2024 (Figure 8 and 9). While data shows a decrease of 10 points of percentage over the past 25 years, Singapre still exhibits an overbearing priority given to defence compared to the global average of 2.5% (SIPRI, March 2024). To compensate for its small population, Singapore invests generously in advanced weaponry, premium maintenance, and training, resulting in Southeast Asia’s most capable military (Hashim, 2020). Domestically, Singapore has developed niche competencies in small arms, artillery, light armoured vehicles, naval vessels, and defense electronics (Bitzinger, 2013; Lee, 2010).

As shown in Figure 8, Indonesia and Malaysia allocate 5% of government spending to defense, below the regional average of 8%, while Singapore allocates 20%, despite a recent decline. GDP share data in Figure 9 reveals that Indonesia’s spending is below the regional average, Malaysia’s is aligned with it, and Singapore’s remains significantly higher.

Adaptation to Chinese Military Systems

Archipelagic Southeast Asia as a field of operation is primarly a maritime space, and presents great distances requiring air force capacities. Adding the challenge of a superior Chinese navy, Southeast Asian states require advanced air and naval capabilities, including anti-ship missiles, submarines, air-defense networks, and long-range strike systems (Mandle & Pearson, 2023). In consequence, maritime states must pursue extensive modernisation of their air force and navy systems (Roberts, 2015, Kurihara, 2023). France offers high-end, interoperable systems such as Rafale jets, Scorpène submarines, and naval vessels, accounting for most French exports since 2014 (SIPRI, March 2024).

This analysis focuses on A2/AD strategies, which deny adversaries access to specific areas and raise the operational costs of entry. According to our hypothesis, French arm procurement under hedging conditions should present a A2/AD profile after 2010.

An analysis of Indonesia's arm procurement from France (Appendice A) shows that there is a shift in the 2010s from modest quantities of small and low-value older-generations systems (armoured personnel carriers, light helicopters, small-range missiles), to bigger quantities of high value and wide-ranged weapon systems (artillery units, radars, and helicopters). It becomes even more visible in the 2020s (helicopters, air-search radars, fighter aircraft, and submarines). Overall, arm transfers become more frequent, more valuable, and more technologically advanced after the 2010s. These changes align with a A2/AD strategy with the procurement of anti-ship missiles, medium-range missile, advanced airborne and ground-based radars strengthening maritime and air denial capabilities. However, the overall procurement reflects a broader long-term defence modernisation beyong a pure territorial denial with acquisitions such as multirole transport helicopters, armoured mobility platforms, modern fighter aircraft, and aerial refuelling capabilities. Hence, the evolution of French arms transfers to Indonesia reflects the incorporation of A2/AD elements within broader patterns of military modernisation.

Malaysia arm procurement from France (Appendice C) shows a shift in the 2010s from high-value orders focused on naval and missile capabilities (medium-range missile, submarine), to smaller purchases of a more balanced mix of high-capability systems ranging from ground forces firepower

(howitzers, mortars), to air mobility support (light and transport helicopters), and surveillance (radars). Such arm procurement pattern indicates a general capability modernisation with some A2/AD-relevant acquisitions.

Singapore arms trade register with France (Appendice E) shows a clear shift in the 2010s from sporadic purchases of a mix of medium-value weapon systems (frigates, missiles, anti-tank systems, and light helicopters) to acquisitions of higher-value systems with multi-domain capabilities (radars, long-range air-to-air and surface-air missile). Complementary acquisitions of armoured personnel carriers, strategic transport and tanker aircraft also indicate ongoing investment in logistics and operational flexibility. If several post-2010 acquisitions are directly relevant to A2/AD strategies, particularly long-range air-defence systems, naval and air-to-air missiles, and integrated radars, some procurements also support force projection and operational flexibility rather than strict denial operations. Singapore's post-2010 procurement reflects a partial A2/AD orientation embedded within a broader military modernisation strategy.

Diversification from American Arm Supply

Deterrence hedging implies to increase a state's strategic flexibility by reducing dependency on dominant suppliers. This section assesses whether Indonesia, Malaysia, and Singapore have diversified away from the United States and China, and if this hedging benefits France as a trade partner.

Over the past 35 years, Indonesia bought weapons from a diverse range of suppliers, but recent trends indicate a concentration among a smaller group of suppliers: France, Germany, South Korea, the United Kingdom, and the United States (Figure 11), mostly due to its shift towards high-value weapon systems. Notably, Indonesia's arms imports from the United States have risen significantly over the past two decades, contradicting the hypothesis of supplier diversification. Nevertheless, France also expanded its share of Indonesia's arms market in recent years, consolidating its position as a key defense partner.

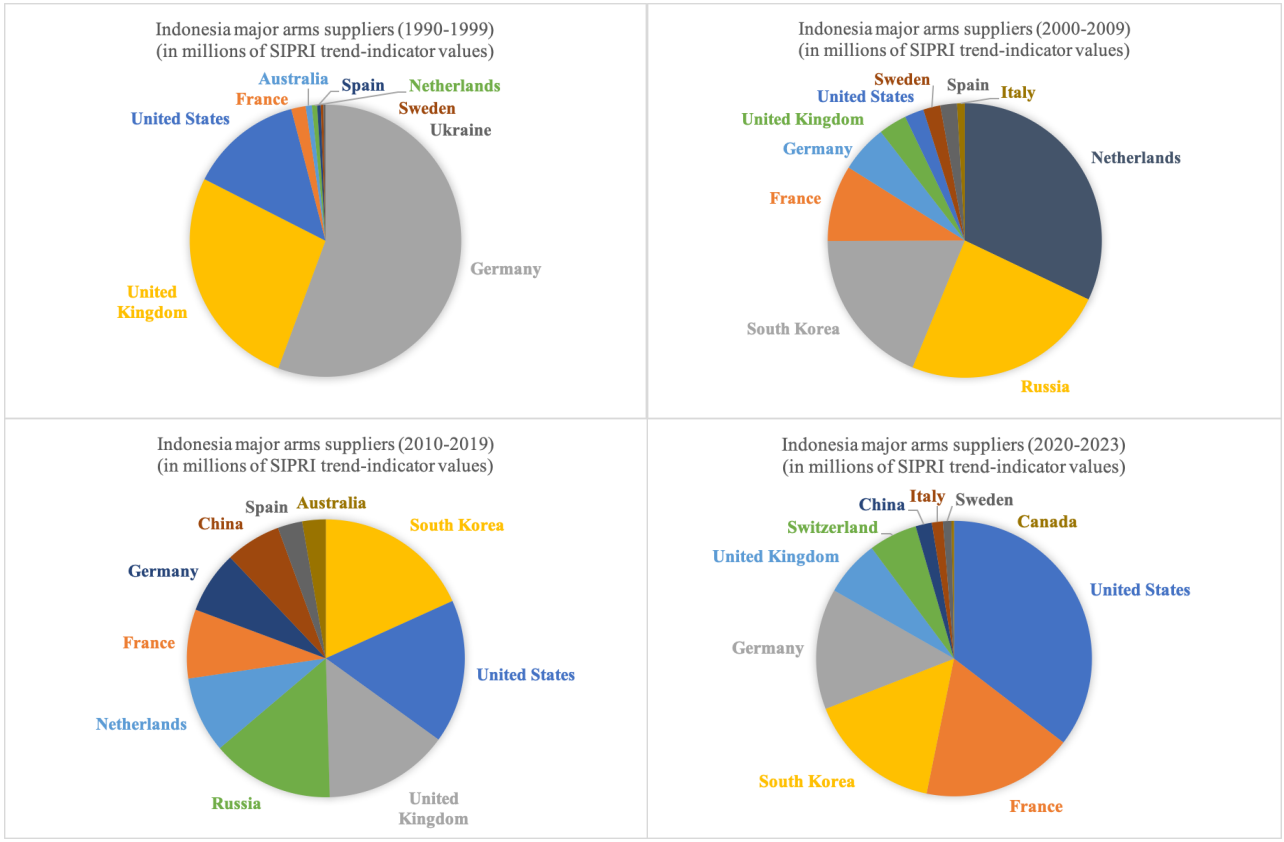
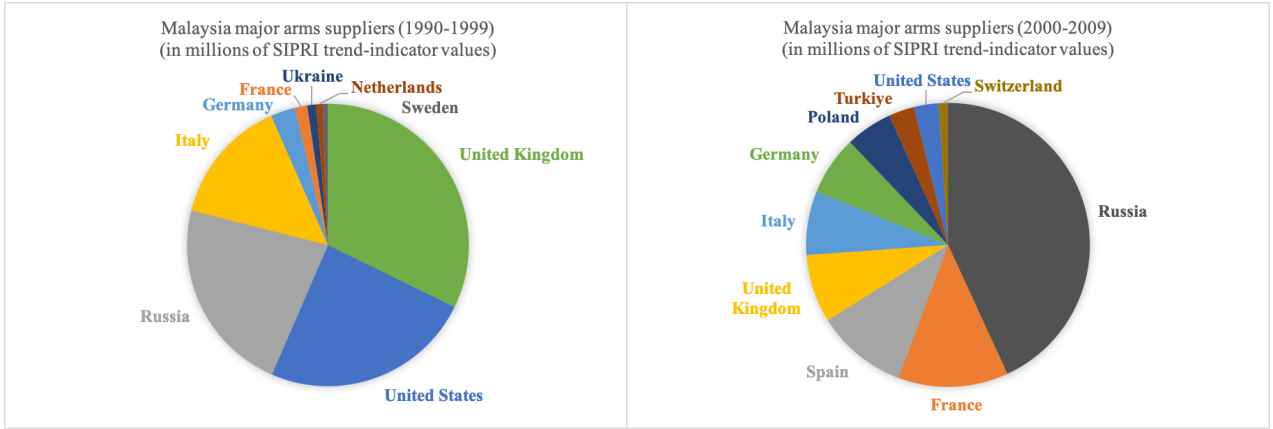


Figure 11
Source: SIPRI Arms Transfers Database, 2025.

Malaysia's arm procurement shifted from the United Kingdom and the United States in favour of Russia in the 2000s, before expanding to European suppliers in the 2010s, especially Spain, Germany, and France (Figure 12). However, by the early 2020s, China emerged as a dominant supplier, accounting for nearly half of Malaysia's arms imports, with Turkey also gaining a larger share. The increase in procurement from both the United States and China contradicts the hypothesis of supplier diversification. While France was a significant arms supplier to Malaysia in the 2000s, its orders declined in the following decade, with major purchases limited to 2009 and 2014.



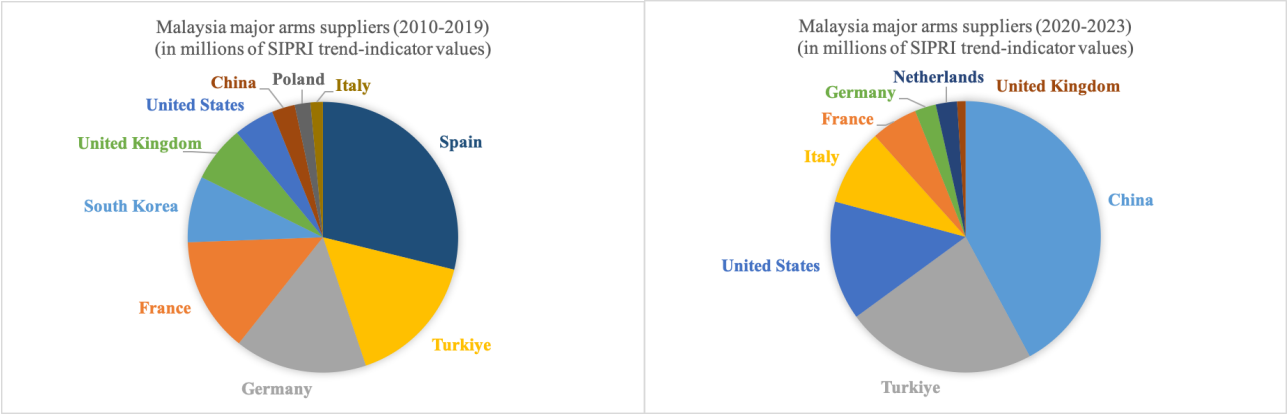


Figure 12
Source: SIPRI Arms Transfers Database, 2025.

Singapore's arm procurement includes a stable share of the United-States over the past 35 years, accounting for approximately half of Singapore's purchases (Figure 13). Singapore also presents a trend of supplier concentration with Israel, Germany and France. There is no observable reduction in American arm transfers, which also opposes the hypothesis of a supplier diversification. France has remained a long-standing supplier to Singapore, with fluctuations in order volume but a clear continuity in procurement relations.

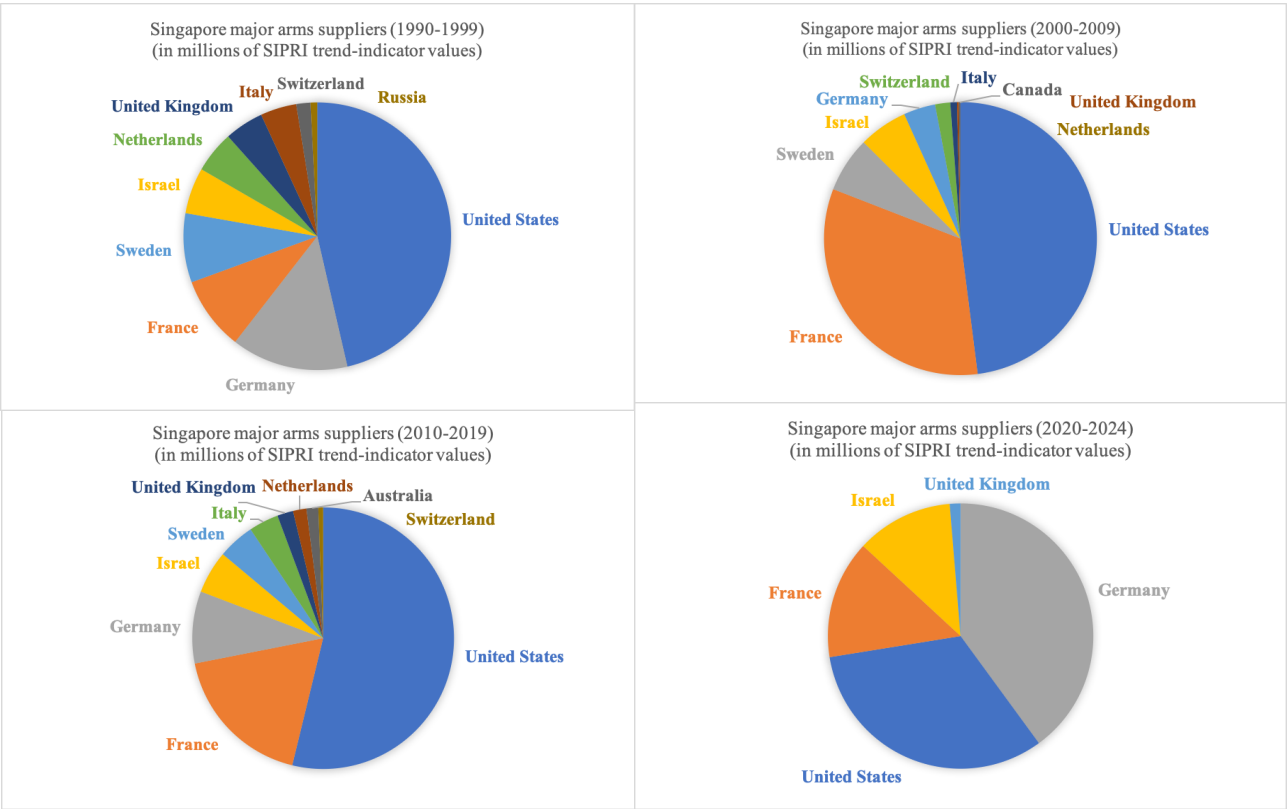


Figure 13
Source: SIPRI Arms Transfers Database, 2025.

The findings are summarised in Table 1 below:

Table 1: Indicators of deterrence hedging

Indicators/**Countries**	**Singapore**	**Malaysia**	**Indonesia**
Excess of standard deterrence	yes	no	no
A2/AD strategy	yes	no	yes
Supply diversification	no	no	partially
Total for hypothesis 1	**partially**	**no**	**partially**

Hypothesis 1 posited that French arms procurement by the three case study countries obeys a deterrence hedging strategy. The analysis shows that Indonesia and Malaysia do not exceed the regional standard deterrence level of 8% of government spending in 2024, whereas Singapore significantly surpasses this threshold, allocating an astonishing level of 20% of its government spending. Examination of arms trade registers indicates that Indonesia, Malaysia, and Singapore have incorporated A2/AD-related capabilities within broader military modernisation programmes. These elements are more pronounced for Singapore and Indonesia than for Malaysia. Finally, the evidence does not support a diversification away from the United States for any of the three countries. Although Indonesia demonstrates an increasing share of French arms imports, this reflects a diversification in suppliers rather with no substantive reduction in dependence on the United States.

Hypothesis 2: Defiance Hedging Through Defence Diplomacy

This chapter evaluates the hypothesis that French arms procurement obeys defiance hedging., i.e., efforts by Southeast Asian states to resist great powers by taking stances that signal independence. In that context, defence diplomacy provides a good signal to great powers of not a simple 'standard deterrence' capacity, developed in the first hypothesis of this thesis, but also with a visible 'ready-to-fight' capacity. Hypothesis 2 therefore posits that French arms procurement is associated with increased defence cooperation with France. To test this hypothesis, the analysis examines three indicators: enhanced military cooperation, technology transfers within arm deals, and the explicit framing of France as a strategic partner.

Enhanced Military Cooperation

Given the lock-in effects inherent in supplier–buyer relationships, arms transfers are typically accompanied by sustained forms of military cooperation. As a residential country in Southeast Asia with oversea territories, France regularly deploys military forces in the region (Figure 24).

Figure 24
Source: French Embassy to India, 2025.

France military cooperation with other countries is conducted alongside these military deployments. Missions such as the *Clémenceau*, *Marianne*, *Pégase*, and *La Pérouse* missions, are regularly accompanied by bilateral and multilateral military exercises. For example, the 2023 edition of the *Pégase* mission, an exercice to demonstrate French Air Force's capacity to be deployed in the Indo-Pacific within a few hours, was complemented by a series of training exercises with regional partners, including Indonesia, Malaysia, and Singapore. Similarly, the 2025 edition of *La Pérouse* mission, aimed at securing strategic maritime routes through the Malacca, Sunda, and Lombok Straits, brought together the naval forces of nine countries: Australia, Canada, India, Indonesia, Malaysia, Singapore, the United Kingdom, and the United States (French Ministry of the Armed Forces, January 2025).

Indonesia and France formalised their defence relationship through a strategic partnership in 2011, followed by a defence cooperation agreement in 2021. More recently, bilateral ties were elevated with the launch of *Joint Vision 2050*, which seeks to deepen defence cooperation through sustained interactions, enhanced interoperability, exchanges of classified defence information, and cooperation in military education and training (Government of the French Republic, 29 May 2025). During the 2023 and 2025 *Pégase* missions, France and Indonesia conducted joint land exercises (Ministry of the Armed Forces of the French Republic, 2023). In addition, a French fregate participated in the 2025 edition of Indonesia's *Komodo* multilateral naval exercise, aimed at strengthening maritime security and humanitarian assistance capabilities (Milhiet & Priamarizki, 2025). The same year, the French aircraft carrier *Charles de Gaulle* also made its first-ever port call in Lombok, accompanied by a meeting of respective Defence Ministers. Taken together, these developments support the hypothesis that arms transfers contribute to enhanced military cooperation.

Malaysia and France have maintained a defence partnership since the signing of a Memorandum of Understanding in 1993, covering military activities as well as cooperation in defence science, technology, and industry. This agreement also led to the establishment of a Defence Joint High Strategic Committee (DJHSC). Bilateral cooperation primarily focuses on joint exercises, training programmes, professional exchanges, and intelligence discussions. During the *Clémenceau* mission, French Navy Rafale aircrafts and Royal Malaysian Air Force fighter jets conducted joint air combat exercises to enhance interoperability. Similarly, the 2025 *Pégase* mission involved naval exercises,

port calls, and passing exercises between the two navies. Malaysian Defence Minister Mohamed Khaled's visit to the aircraft carrier *Charles de Gaulle* in March 2025 further illustrates the symbolic dimension of this cooperation (Embassy of France in Malaysia, July 2025). Nevertheless, the overall level of military cooperation remains limited, reflecting the relatively modest scale of arms transfers between the two countries. This does not contradict the hypothesis; rather, it suggests that limited procurement is indeed associated with limited military cooperation.

French-Singaporean military cooperation is overseen by a 1998 agreement that has, since 1999, allowed a squadron of the Republic of Singapore Air Force to be stationed in France (Ganesan, 2005). High-level military exchanges have taken place regularly since 1997, complemented by an annual strategic dialogue between the two ministries of defence. Bilateral relations were upgraded to a Strategic Partnership in 2012 and are scheduled to be reinforced following a declaration of intent in May 2025, especially in the fields of artificial intelligence and advanced defence technologies (Baharudin, 2025). Singapore also hosts the Information Fusion Centre for regional maritime security, to which France has appointed a liaison officer (Senate of the French Republic, 2023). During the 2025 *Clémenceau* mission, the French and Singaporean navies conducted joint exercises and technical exchanges between respective engineering teams (Singapore Navy, 2025). The depth and technical sophistication of this cooperation strongly support the hypothesis that arms transfers are associated with enhanced military cooperation.

Technology Transfers in the Defence Sector

France usually includes technology transfer, co-production, and industrial offsets in its deals, aligning with the need of Southeast Asian countries to expand their capabilities for indigenous arms manufacturing through the use of industrial offsets as a part of arms acquisitions (Bitzinger, 2013). However, as highlighted in the literature review, technology transfers very much depends on a country's technological absorption capability. Given the high research and development costs associated with advanced military technologies, arms imports have often yielded limited economic benefits for middle-income economies.

Indonesia's experience with domestic defence production illustrates these limitations. Although technology transfer has been a central component of defence-industrial rhetoric under President

Soeharto, tangible results remained modest throughout the 1990s (Bitzinger, 2013; Roberts, 2015). While the Indonesian government has sought to reduce its reliance on arms imports by building its defence industrial base, especially under its 2014 defence offset regulation, progress has been constrained by chronic underfunding. Within the framework of *Vision 2050*, France committed to supporting Indonesia's defence-industrial development through technology transfer, joint production, and industrial cooperation (Government of the French Republic, 29 May 2025). For example, the acquisition of C-295 transport aircraft included offset arrangements benefiting PT Dirgantara Indonesia through Airbus. These developments support the hypothesis that arms procurement from France is associated with increased technology transfer.

Despite investment in offsets, Malaysia's defence industry remains humble and dependent on foreign suppliers. In July 2025, Malaysia and France signed a landmark memorandum of understanding aimed at strengthening defence-industrial cooperation across aerospace, maritime, and land systems. This agreement includes joint research, technology transfer, and industrial partnerships (CAN Newswire, 2025). While this agreement signals future potential, concrete outcomes remain limited at present.

France is Singapore's third-largest partner in defence-related research and development, reflecting substantial investment by both countries (Embassy of France in Singapore, May 2020). Their cooperation is structured around joint research, design, and development programmes, as well as joint technology funds (Ganesan, 2005). The *Delta programme* is one example of the transfer of know-how and of technology: Singapore acquired six stealth frigates, with the first built in France and the remaining five built domestically. Singapore also collaborates with Airbus in manufacturing and marketing the EC-120 light utility helicopter (Bitzinger, 2013). These cases strongly corroborate the link between arms transfers and technology transfer, and also reflect Singapore's superior absorptive capacity.

Political Rhetoric of Strategic Partnership

The final indicator of defiance hedging examines whether France is framed in official defence rhetoric as a strategic partner, or even as a potential ally after the 2010s geopolitical shift in the region. This analysis is based on a comparison of defence policy documents before and after 2010.

Indonesia's 2003 Defence White Paper presents the international system as characterised by asymmetric globalisation dominated by the United States, with other major powers, including the European Union and China, exerting secondary influence. France is not mentioned explicitly. By contrast, the 2015 Defence White Paper identifies France as a strategic partner, particularly in the domain of technology transfer and defence-industrial cooperation: "*France is an important partner in the joint development of technology of the main warfare of defence systems.* […] *This cooperation agreed on various fields: development of strategic defence dialogue, the exchange of intelligence information, and peacekeeping operations. The cooperation is done through the provision and maintenance/ repairing the main equipment of weapon systems of TNI* [Tentara Nasional Indonesia/Indonesian National Armed Forces]. *France is willing to transfer technology and procurement of co-productions*."

A similar evolution can be observed in Malaysia's defence documents. The 2010 Defence White Paper focuses primarily on internal reform and force credibility. France is only mentioned in the listing of military exercises. The 2020 report, however, highlights France as a significant defence partner, also in relation to technology transfer and capacity building: "*France, one of the major suppliers of Malaysia's defence assets and technology, has contributed significantly to the offset programmes particularly in capacity building and the transfer of technology. Both countries have also widened defence cooperation on cyber security, counter-terrorism and PKOs*." In addition, France is framed as a key extra-regional strategic partner: "*(b)eyond Asia, Malaysia has a strong foundation of long-standing defence partnerships with several extra-regional countries, including Australia, France, New Zealand, Russia, the United Kingdom (UK) and the US*."

Regrettably, Singapore does not publish regular defence white papers, and the most recent defense white paper was released in 2000. Neither this document nor subsequent public materials on the Total Defence concept for example explicitly frame France as a strategic partner, limiting the ability to assess this indicator in the Singaporean case.

Overall, France is portrayed as a valuable partner in technology transfer and capacity building rather than as a core strategic ally. The absence of explicit alliance-oriented rhetoric suggests that Indonesia and Malaysia continue to pursue a hedging strategy rather than any alignment.

The findings are summarised in Table 2 below:

Table 2: Indicators of defiance hedging

Indicator/**Countries**	**Singapore**	**Malaysia**	**Indonesia**
Military cooperation	yes	no	yes
Technology transfers	yes	partially	yes
Political rhetoric of strategic aligment	no data	partially	no
Total for hypothesis 2	**partially**	**no**	**partially**

Hypothesis 2 examined whether French arms procurement is associated with defiance hedging, signaled through enhanced military cooperation, technology transfers, and political rhetoric. The analysis shows that lock-in effects between arms procurement and defence cooperation are observable, especially for Indonesia and Singapore. France's emphasis on technology transfers further reinforces its role as a partner supporting strategic autonomy, as illustrated by the *Vision 2050* with Indonesia, the *Delta programme* with Singapore, or the 2025 memorandum of understanding with Malaysia. However, the close reading of key defence documents for Indonesia and Malaysia does not support an active framing of France as a key strategic partner or even a strategic ally. This reinforces the conclusion that Southeast Asian states continue to pursue a calibrated hedging strategy rather than new alignment choices.

Chapter 4: Discussion

Hedging strategies of Southeast Asian states entail a deliberate balancing of engagement with both China and the United States, combined with efforts to diversify sources of security cooperation beyond these two major powers. In the military domain, hedging manifests through selective alignment, arms procurement, and the development of defence partnerships. This master's thesis examined the military hedging behaviour of Malaysia, Indonesia, and Singapore in relation to France. It focused on two indicators of military hedging, arms procurement and defence diplomacy, conceptualised respectively as expressions of deterrence hedging and defiance hedging.

Deterrence hedging through arms procurement was assessed through three indicators: an excessive standard deterrence levels, a A2/AD procurement strategy, and a diversification of procurement away from the two big powers. The findings indicate that Singapore substantially exceeds the regional standard deterrence, whereas Indonesia and Malaysia do not. All three countries exhibit procurement patterns compatible with A2/AD strategies, more clearly in the cases of Singapore and Indonesia. However, no clear evidence of diversification away from the United States was observed. Only Indonesia demonstrates a growing share of French arms imports, suggesting partial diversification without a corresponding reduction in dependence on American suppliers.

Defiance hedging was assessed through three indicators signaling a correlation between arms procurement and defence diplomacy: enhanced military cooperation, technology transfers, and political rhetoric framing France as a strategic partner. The analysis reveals enhanced defence partnerships with France over the past decade for Indonesia, limited but promising cooperation with Malaysia, and long-standing defence ties with Singapore. France offers technology transfers as part of its arm deals with the three country, and is primarly framed as such, a provider of technology transfer, rather than a core strategic partner or ally.

A summary of these findings is presented in Table 3 below.

Table 3: Hedging Indicators

Indicators/**Countries**	**Singapore**	**Malaysia**	**Indonesia**
Excess of standard deterrence	yes	no	no
A2/AD strategy	yes	no	yes
Supply diversification	no	no	partially
Military cooperation	yes	no	yes
Technology transfers	yes	partially	yes
Political rhetoric of strategic alignment	no data	no	no
Aggregated findings	**yes**	**no**	**yes**

Although the indicators employed in this study are necessarily selective and primarily correlational, they provide a useful macro-level perspective by integrating quantitative economic data with qualitative political analysis. It develops a 'big picture' and overall feel of where Indonesia, Malaysia and Singapore stands when it comes to their defense sector interactions with France.

Overall, Malaysia presents itself as the least convincing case of hedging through French arms procurement. Arms transfers remain sporadic, and lock-in effects manifested through military cooperation, technology transfer, and strategic realignment are limited. Nonetheless, the analysis identifies potential for future development, especially in light of recent technology transfer agreements and the strategic orientations articulated in Malaysia's 2020 Defence White Paper.

Singapore constitutes a distinctive case within the Southeast Asian security landscape. More than a simple arm recipient, Singapore possesses a highly developed domestic defence industry and long-standing defence ties with France. Its hedging behaviour in relation to French arms procurement appears relatively robust: defence expenditure definitely exceeds regional deterrence levels, procurement patterns align with A2/AD strategies, and lock-in effects are evident through sustained military cooperation and technology transfers. However, this raises the question of whether Singapore's elevated level of standard deterrence reflects hedging behaviour or would instead be inherent to its broader defence policy. Historical data indicate that defence spending has consistently been high, reaching up to 30% of government expenditure in the 1990s and 2000s. As noted by Leifer (2000) and Ganesan (2005), this pattern can be attributed to the survivalist

mentality and rhetoric of the People's Action Party (PAP). Moreover, while technology transfers may signal strategic alignment, their effectiveness depends on absorptive capacity, which in turn requires a robust domestic industrial and technological base (Balakrishnan & Lazar, 2022). Finally, Singapore's strong strategic alignment with the United States constrains France's potential role as an authentic alternative security partner.

Indonesia represents the most dynamic case of military hedging through French arms procurement. Arms transfers from France have increased in recent years and display clear A2/AD characteristics. Bilateral defence partnerships, military cooperation, and technology transfer agreements have expanded accordingly. Nevertheless, these developments remain relatively recent, as Indonesia is currently engaging in what has been described as a "defence shopping spree" (Figiaconi, 2023). Moreover, Indonesia continues to rely heavily on the United States for arms procurement, limiting the extent to which French engagement translates into strategic diversification.

Overall, the findings suggest that France is not perceived as a credible alternative to the United States in the domain of arms procurement, despite its ambition to position itself as a "third way" in the global defence market. Interestingly enough, France seems to apprehend such need from Southeast Asian states: "*France will develop and promote sovereignty partnerships consolidated at the national level (India and, following this model, which responds to the needs expressed by Southeast Asian countries, Indonesia and Singapore)* […] *to support the resilience of coastal states, reduce national dependencies and combat trafficking*." (Government of the French Republic, 2025). In this sense, the study contributes to a more nuanced understanding of Southeast Asian defence needs that could prove to be useful for secondary security partners such as France.

This research aligns closely with Kuik's (2021) typology of hedging strategies in Southeast Asia. The limited evidence of hedging in Malaysia corroborates Kuik's characterisation of Malaysia as engaging in "light hedging," while Singapore exemplifies "heavy hedging" and Indonesia occupies an intermediate position. The research extends existing scholarship by focusing specifically on France as a diversification partner, thereby highlighting differentiated patterns of military hedging across the three countries.

Existing scholarship by Bitzinger (2013) and Balakrishnan (2021) expresses scepticism regarding the defence-industrial capacities of Indonesia and Malaysia. Further research could test the two countries technology absorption capabilities through a case study on the technology transfer within a domestic defence industry, such as for example the recent Malaysian military developments in the Sabah and Sarawak states (DayakDaily, 2024). Such study could assess potential avenues for industrial cooperation between Malaysian and French defence industries.

This research faced several limitations related to language constraints, data availability, and methodological choices. The analysis focused exclusively on exogenous drivers of arms procurement and did not systematically examine domestic factors, largely due to limited access to primary sources in bahasa Malaysia and Indonesia. Yet, as Kuik and Rozman (2015) argue, hedging strategies are closely linked to domestic legitimation processes, whereby political elites reinforce their authority by aligning policy choices with sources of legitimacy. This dimension was beyond the scope of this study but would be of great interest for further investigation. Additional limitations include restricted access to Singaporean defence policy materials and limited publicly available data on technology transfers in Malaysia, partly due to the recency of the phenomenon. Methodologically, while the political economy approach adopted enabled the integration of strategic and economic perspectives, it relied on a relatively narrow qualitative dataset. A more systematic content analysis of official statements, defence agreements, and policy documents would strengthen the quality of findings by providing more robust evidence of hedging narratives.

Conclusion

Arms procurement is shaped by a combination of domestic security requirements, economic considerations, and the pursuit of strategic influence. Southeast Asia's militarisation over the past two decades has been driven by the intensifying strategic competition between China and the United States, as well as by the region's own responses to an increasingly uncertain security environment.

In this context, the framework of hedging provides a valuable analytical lens, as it restores agency to Southeast Asian states by emphasising active strategies aimed at minimising security risks. Rather than aligning unequivocally with a single great power, states pursue hedging by expanding military capabilities and forging selective defence partnerships without explicitly opposing any actor. Indonesia, Malaysia, and Singapore, each with distinct strategic alignments and levels of economic development, have pursued arms procurement and defence diplomacy as central pillars of their hedging strategies.

At the same time, Southeast Asia has emerged as an attractive market for European arms manufacturers facing saturated and highly competitive markets in the West. Consequently, the region has been framed by countries such as France as both a commercial opportunity and a geostrategic focal point. France has sought to position itself as a "third way" in the Indo-Pacific, presenting its defence partnerships as an alternative to Sino-American rivalry.

This master's thesis examined the extent to which the diversification of arms supply and strategic partnerships by Indonesia, Malaysia, and Singapore with France is driven by hedging motivations. The findings indicate that while hedging does shape arms procurement from France in all three cases, its intensity and strategic significance vary considerably.

Singapore emerges as the most pronounced hedger. Its defence expenditure far exceeds regional averages, its procurement strategy strongly reflects an Anti-Access/Area Denial (A2/AD) orientation, and its defence relationship with France is both long-standing and institutionalised. However, Singapore's exceptionally high military spending and enduring strategic alignment with the United States suggest that its hedging behaviour is less a response to recent geopolitical

developments than an extension of its long-standing survivalist defence posture. Indonesia, by contrast, displays the most dynamic evolution in its arms procurement from France. Recent acquisitions have increased in both volume and technological sophistication, with a growing emphasis on A2/AD-relevant capabilities, accompanied by expanded defence cooperation, joint exercises, and technology transfer agreements. Nevertheless, Indonesia remains heavily dependent on the United States for its core defence requirements, indicating that its hedging with France remains partial and ongoing. Malaysia represents the lightest form of hedging through French arms procurement. Although recent initiatives point to growing interest in defence cooperation and technology transfers, arms imports from France remain sporadic, and Malaysia's defence posture continues to be dominated by its strategic engagements with China and the United States.

Overall, this thesis does not seek to overturn existing understandings: as effective hedgers, the three countries have little incentive to privilege France over other security partnerships. This does not imply, however, that the three countries dismiss France as a strategic partner. Rather, France is valued as a provider of advanced defence technologies and capacity building, offering a useful, though not decisive, option for diversification. Future research could explore the domestic political and industrial dimensions of hedging, as well as the tangible outcomes of technology transfer agreements. As the geopolitical landscape continues to evolve, France's ability to build a meaningful role in the region will depend not only on the quality of its defence offerings but also on its capacity to align them with the security priorities of Southeast Asian countries.

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Appendices

Trade Registers

Appendice A: Transfers of Major Conventional Arms from France to Indonesia (1990-2024)

Weapon	Weapon description	Nb	Order	Delivery
Mistral	portable SAM	60	2004	2007
AMX-13-PDP	armoured bridgelayer	10	1960	1961
AMX-13/75	light tank	175	1960	1961
SA-313B Alouette-2	light helicopter	2	1960	1961
MO-120-RT 120mm	mortar	75	1961	1962
AMX Mk-61	self-propelled gun	4	1960	1962
AMX-VCI	armoured personnel carrier	32	1960	1962
ENTAC	anti-tank missile	500	1962	1963
SA-316B Alouette-3	light helicopter	10	1961	1966
SA-313B Alouette-2	light helicopter	7	1968	1969
SA-330 Puma	helicopter	9	1977	1978
TRS-2215	air-search radar	14	1978	1979
MM-38 Exocet	anti-ship missile	60	1976	1979
AMX-10P	infantry fighting vehicle	24	1981	1981
AMX-10PAC-90	infantry fighting vehicle	10	1981	1982
AS-532 Cougar	transport helicopter	4	1983	1984
TB-9 Tampico	light aircraft	4	1993	1994
LG1 105mm	towed gun	20	1994	1996
Mistral	portable SAM	60	1996	1997
VBL	armoured reconnaissance	18	1996	1997
Mistral	portable SAM	120	1996	1997
VAB-VTT	armoured personnel carrier	18	1997	1997
Fox	UAV	4	2000	2000
Ocean Master	maritime patrol aircraft radar	9	1996	2000
AS-532 Cougar	transport helicopter	10	1997	2001
EC-120 Colibri	light helicopter	15	2000	2001
Ocean Master	maritime patrol aircraft radar	3	2001	2002

TB-9 Tampico	light aircraft	5	2004	2004
Master	air-search radar	1	2004	2006
ship engine	ship engine	2	2005	2006
VAB-VTT	armoured personnel carrier	32	2006	2007
TSM-2633	anti-submarine sonar	2	2004	2007
ship engine	ship engine	4	2004	2007
TSM-2633	anti-submarine sonar	2	2005	2008
Mistral	portable SAM	60	2005	2008
vehicle engine	vehicle engine	150	2006	2008
ship engine	ship engine	4	2005	2008
EC-120 Colibri	light helicopter	2	2008	2009
MM-40 Exocet	anti-ship missile	30	2004	2010
Master	air-search radar	3	2008	2011
Sherpa	armoured personnel carrier	100	2011	2011
Mistral	portable SAM	136	2012	2013
vehicle engine	vehicle engine	12	2010	2013
vehicle engine	vehicle engine	134	2012	2013
CAESAR 155mm	self-propelled gun	37	2012	2014
AS-350/AS-550 Fennec	light helicopter	6	2012	2014
Ground Master-200	air-search radar	10	2014	2016
H725 Caracal	transport helicopter	6	2012	2016
AS565M Panther	helicopter	9	2014	2017
AS-355/AS-555 Fennec	light helicopter	6	2012	2017
TSM-2633	anti-submarine sonar	2	2013	2017
MM-40-3 Exocet	anti-ship/land-attack missile	45	2016	2019
VL-MICA-M	naval SAM system	2	2016	2019
CAESAR 155mm	self-propelled gun	18	2017	2019
AS-565S	anti-submarine helicopter	2	2014	2019
vehicle engine	vehicle engine	14	2016	2019
MICA	long-range air-to-air missile	40	2018	2019
H725 Caracal	transport helicopter	8	2019	2023
Ground Master-400	air-search radar	1	2023	2024
vehicle engine	vehicle engine	12	2022	2024
A-330 MRTT	tanker/transport aircraft	0	2023	

Rafale F4	FGA aircraft	0	2022	
Scorpene	submarine	0	2024	
Helios-2	surveillance satellite	0	2023	

Appendice B: Transfers of Major Conventional Arms to Indonesia (1990-2024)

Supplier	Weapon designation	Weapon description	Nb	Order	Delivery
China	NG-18 30mm	naval gun	8	2013	2013
China	QW-3	portable SAM	50	2023	2024
China	C-802	anti-ship missile	25	2011	2012
China	Type-825	naval gun	1	2014	2015
China	C-802	anti-ship missile	3	2005	2008
China	GDF 35mm	anti-aircraft gun	4	2015	2016
China	Skyguard	air-search/fire-control radar	1	2015	2016
China	Type-90	multiple rocket launcher	4	2015	2016
China	Type-825	naval gun	1	2016	2017
China	Type-347G	fire-control radar	8	2009	2015
China	NG-18 30mm	naval gun	2	2016	2017
China	AR-2	air-to-surface/anti-ship missile	40	2017	2021
China	AR-1	air-to-surface missile	40	2017	2019
China	QW-3	portable SAM	130	2006	2006
China	TD-2000B	self-propelled AD system	8	2008	2012
China	QW-3	portable SAM	15	2009	2010
China	Type-360	air-search radar	8	2009	2011
China	QW-3	portable SAM	200	2008	2012
China	TH-5711 Smart Hunter	air-search radar	3	2009	2011
China	SR-74	air-search radar	2	2008	2012
China	CH-4B	armed UAV	6	2017	2019
China	C-705	anti-ship missile	80	2011	2014
Denmark	C-Fire	electro-optical fire-control	4	2019	2022
Denmark	ship engine	ship engine	2	2017	2019
Denmark	ship engine	ship engine	2	2000	2003
Denmark	Scanter-4100	air/sea-search radar	1	2013	2015
Denmark	Scanter-4603	air/sea-search radar	4	2019	2022
Denmark	ship engine	ship engine	8	2004	2007
France	Mistral	portable SAM	60	2004	2007
France	Mistral	portable SAM	60	1996	1997

France	VAB-VTT	armoured personnel carrier	32	2006	2007
France	Ground Master-400	air-search radar	1	2023	2024
France	TSM-2633 Spherion-B	anti-submarine sonar	2	2005	2008
France	Ground Master-200	air-search radar	10	2014	2016
France	MM-40-3	anti-ship/land-attack missile	45	2016	2019
France	VL-MICA-M	naval SAM system	2	2016	2019
France	AS-532 Cougar	transport helicopter	10	1997	2001
France	Master	air-search radar	3	2008	2011
France	AS565M	helicopter	9	2014	2017
France	CAESAR	self-propelled gun	18	2017	2019
France	TB-9 Tampico	light aircraft	4	1993	1994
France	AS-565S	anti-submarine helicopter	2	2014	2019
France	CAESAR	self-propelled gun	37	2012	2014
France	AS-355/ AS-555 Fennec	light helicopter	6	2012	2017
France	AS-350/ AS-550 Fennec	light helicopter	6	2012	2014
France	MM-40 Exocet	anti-ship missile	30	2004	2010
France	H725 Caracal	transport helicopter	6	2012	2016
France	TSM-2633 Spherion-B	anti-submarine sonar	2	2004	2007
France	Sherpa	armoured personnel carrier	100	2011	2011
France	EC-120 Colibri	light helicopter	2	2008	2009
France	TSM-2633 Spherion-B	anti-submarine sonar	2	2013	2017
France	Mistral	portable SAM	60	2005	2008
France	Mistral	portable SAM	136	2012	2013
France	LG1 105mm	towed gun	20	1994	1996
France	Fox	UAV	4	2000	2000
France	VBL	armoured reconnaissance	18	1996	1997
France	Mistral	portable SAM	120	1996	1997
France	VAB-VTT	armoured personnel carrier	18	1997	1997
France	Ocean Master	maritime patrol aircraft radar	3	2001	2002
France	Ocean Master	maritime patrol aircraft radar	9	1996	2000

France	EC-120 Colibri	light helicopter	15	2000	2001
France	Master	air-search radar	1	2004	2006
France	TB-9 Tampico	light aircraft	5	2004	2004
France	vehicle engine	vehicle engine	150	2006	2008
France	vehicle engine	vehicle engine	14	2016	2019
France	H725 Caracal	transport helicopter	8	2019	2023
France	MICA	long-range air-to-air missile	40	2018	2019
France	vehicle engine	vehicle engine	12	2010	2013
France	ship engine	ship engine	4	2005	2008
France	vehicle engine	vehicle engine	134	2012	2013
France	ship engine	ship engine	4	2004	2007
France	ship engine	ship engine	2	2005	2006
France	vehicle engine	vehicle engine	12	2022	2024
Germany	G-120TP	trainer aircraft	6	2017	2018
Germany	G-120TP	trainer aircraft	6	2014	2015
Germany	ship engine	ship engine	24	2009	2011
Germany	SUT	anti-ship/anti-submarine	5	1982	1990
Germany	Parchim	corvette	16	1992	1993
Germany	Frosch-2	support/landing ship	2	1992	1995
Germany	Kondor	minesweeper	9	1992	1994
Germany	Bo-105	light helicopter	18	1976	1990
Germany	Buffel	armoured recovery vehicle	3	2012	2016
Germany	BPz-2	armoured recovery vehicle	2	2012	2015
Germany	PiPz-1	armoured engineer vehicle	3	2012	2016
Germany	BrPz-1 Biber	armoured bridgelayer	3	2012	2015
Germany	ship engine	ship engine	12	2011	2014
Germany	PB-57	patrol boat	4	1982	1992
Germany	Leopard-2A4	tank	42	2012	2013
Germany	Frosch-1	landing ship	12	1992	1993
Germany	vehicle engine	vehicle engine	37	2012	2014
Germany	Marder-1A3	infantry fighting vehicle	42	2012	2013
Germany	PB-57	patrol boat	4	1993	2000
Germany	G-120TP	trainer aircraft	18	2011	2013
Germany	Leopard-2A4	tank	61	2012	2016
Germany	ship engine	ship engine	12	1999	2000
Germany	ship engine	ship engine	12	2000	2000

Germany	vehicle engine	vehicle engine	18	2017	2019
Germany	MHV-60	MCM ship	2	2019	2023
Germany	ship engine	ship engine	12	2011	2017
Germany	KaleidoScope	submarine sonar	3	2011	2017
Italy	Arisgator	armoured personnel carrier	10	2016	2017
Italy	Super Rapid 76mm	naval gun	3	2013	2014
Italy	Super Rapid 76mm	naval gun	2	2004	2007
Italy	Super Rapid 76mm	naval gun	2	2005	2008
Italy	A244	anti-submarine torpedo	30	2004	2007
Italy	Super Rapid 76mm	naval gun	2	2012	2017
Italy	Black Shark	anti-ship/anti-submarine	29	2013	2018
Italy	RAT-31DL	air-search radar	1	2020	2023
Netherlands	SIGMA-105	frigate	1	2013	2017
Netherlands	SIGMA-105	frigate	1	2012	2017
Netherlands	SIGMA-90	frigate	2	2004	2007
Netherlands	SIGMA-90	frigate	2	2005	2008
Netherlands	WM-20	fire-control radar	2	1982	1990
Netherlands	Variant	air/sea-search radar	4	1999	2000
Netherlands	LIROD	fire-control radar	4	1994	2000
Norway	NASAMS-2	SAM system	2	2017	2020
Poland	Grom-2	portable SAM	14	2016	2016
Poland	Kobra MMSR	anti-aircraft gun/SAM system	1	2006	2009
Poland	Kobra MMSR	anti-aircraft gun/SAM system	1	2005	2007
Poland	Grom-2	portable SAM	74	2005	2007
Poland	Grom-2	portable SAM	81	2006	2009
Russia	R-73	short-range air-to-air missile	50	2008	2010
Russia	BMP-3	infantry fighting vehicle	17	2008	2010
Russia	BREM-L	armoured recovery vehicle	1	2008	2010
Russia	BMP-3	infantry fighting vehicle	37	2013	2014
Russia	R-77	long-range air-to-air missile	60	2008	2012
Russia	Su-30MK	FGA aircraft	6	2012	2013
Russia	Yakhont	anti-ship missile	10	2009	2011

Russia	Su-30MK	FGA aircraft	3	2008	2009
Russia	Mi-17	transport helicopter	6	2010	2011
Russia	Kh-29	air-to-surface missile	25	2009	2011
Russia	Kh-59M Ovod-	air-to-surface missile	10	2009	2012
Russia	Su-30MK	FGA aircraft	2	2003	2003
Russia	Mi-17	transport helicopter	2	2002	2003
Russia	BTR-80A	infantry fighting vehicle	12	2001	2002
Russia	Mi-17	transport helicopter	4	2002	2004
Russia	Mi-2	light helicopter	2	2002	2003
Russia	Su-27S	FGA aircraft	2	2003	2003
Russia	Mi-24P/Mi-35P	combat helicopter	2	2003	2003
Russia	Mi-24P/Mi-35P	combat helicopter	3	2008	2010
Russia	Mi-17	transport helicopter	6	2005	2008
Russia	9M114 Kokon	anti-tank missile	25	2003	2003
Russia	Igla-1	portable SAM	16	2003	2003
Russia	Su-27S	FGA aircraft	3	2008	2010
Russia	Kh-31A1	anti-ship/anti-radar missile	10	2009	2011
South Africa	Casspir	armoured personnel carrier	2	2003	2004
South Korea	KT-1 Woongbi	trainer aircraft	3	2018	2021
South Korea	Chiron	portable SAM	150	2012	2013
South Korea	Barracuda	armoured personnel carrier	20	2003	2004
South Korea	Chiron	portable SAM	60	2018	2020
South Korea	T-50 Golden	trainer/combat aircraft	16	2011	2013
South Korea	LPD-122m	amphibious assault ship	4	2004	2007
South Korea	KT-1 Woongbi	trainer aircraft	8	2005	2011
South Korea	Black Fox	infantry fighting vehicle	22	2009	2013
South Korea	KT-1 Woongbi	trainer aircraft	7	2001	2003
South Korea	LPD-122m	amphibious assault ship	1	2017	2019
South Korea	Type-209/1400	submarine	3	2011	2017
South Korea	KH-178	towed gun	54	2010	2011
South Korea	KH-179	towed gun	36	2011	2012
South Korea	LVTP-7	armoured personnel carrier	10	2009	2009
South Korea	KT-1 Woongbi	trainer aircraft	5	2005	2007
South Korea	LPD-122m	amphibious assault ship	1	2000	2003
Spain	C-295	transport aircraft	9	2012	2012
Spain	C-212	transport aircraft	6	2009	2013

Spain	C-212	transport aircraft	2	1996	1999
Spain	C-212MP	maritime patrol aircraft	6	1996	2005
Sweden	SAK-70 Mk-2 57mm	naval gun	4	2019	2022
Sweden	Skeldar	UAV	1	2016	2017
Sweden	SAK-70 Mk-2 57mm	naval gun	2	1982	1992
Sweden	SAK-70 Mk-2 57mm	naval gun	8	1994	2000
Switzerland	Skyshield-35	anti-aircraft gun system	6	2012	2014
Switzerland	Skyshield-35	anti-aircraft gun system	1	2014	2015
Switzerland	Fieldguard-3	fire-control radar	6	2012	2014
Switzerland	Skyshield-35	anti-aircraft gun system	3	2018	2020
Switzerland	Fieldguard-3	fire-control radar	4	2019	2020
Thailand	First Win	armoured personnel carrier	5	2018	2019
Turkiye	MMWT	tank	18	2019	2024
UAE	DHC-5 Buffalo	transport aircraft	5	1995	1995
Ukraine	R-27R/T	long-range air-to-air missile	150	2005	2008
Ukraine	BREM-2	armoured recovery vehicle	3	1996	1997
Ukraine	BTR-4	infantry fighting vehicle	2	2014	2016
Ukraine	Dozor-B	armoured personnel carrier	2	2019	2020
Ukraine	R-27R/T	long-range air-to-air missile	5	2014	2015
Ukraine	BTR-4K	armoured personnel carrier	3	2014	2016
Ukraine	BMP-2	infantry fighting vehicle	2	1998	1998
Ukraine	BTR-50	armoured personnel carrier	34	1997	1997
United Kingdom	Starstreak	SAM	1000	2012	2014
United Kingdom	Forceshield	SAM system	10	2014	2016
United Kingdom	Hawk-200	FGA aircraft	16	1993	1996
United Kingdom	Hawk-100	trainer/combat aircraft	8	1993	1996
United Kingdom	Brunei	frigate	3	2013	2014
United Kingdom	Stormer	armoured personnel carrier	35	1995	1996
United Kingdom	Stormer	armoured personnel carrier	5	1996	1998
United Kingdom	AR-325 Commander	air-search radar	2	1989	1993
United Kingdom	Rover	replenishment tanker	1	1991	1992
United Kingdom	Scorpion-90	light tank	35	1995	1995

United Kingdom	Hawk-200	FGA aircraft	16	1996	1999
United Kingdom	Scorpion-90	light tank	45	1996	1998
United Kingdom	vehicle engine	vehicle engine	50	1994	1994
United States	ScanEagle	UAV	8	2019	2022
United States	HELRAS	anti-submarine sonar	2	2014	2019
United States	vehicle engine	vehicle engine	18	2019	2024
United States	AAQ-33 Sniper ATP	aircraft electro-optical system	16	2017	2019
United States	APG-68	combat aircraft radar	10	2014	2020
United States	F-16C	FGA aircraft	24	2012	2014
United States	APS-143(V)	maritime patrol aircraft radar	2	2013	2014
United States	Bell-412	helicopter	3	1996	1997
United States	vehicle engine	vehicle engine	4	2016	2017
United States	King Air	light transport aircraft	1	2016	2017
United States	vehicle engine	vehicle engine	20	2017	2020
United States	Baron	light aircraft	2	2014	2015
United States	vehicle engine	vehicle engine	3	2013	2014
United States	AGM-114 Hellfire-2	anti-tank/air-to-surface missile	140	2014	2017
United States	APG-78	combat helicopter radar	4	2012	2017
United States	aircraft engine	aircraft engine	3	2012	2018
United States	AH-64E	combat helicopter	8	2014	2017
United States	Bell-412	helicopter	25	2012	2012
United States	Bonanza	light aircraft	4	2014	2015
United States	FGM-148	anti-tank missile	180	2013	2014
United States	JDAM	guided bomb	102	2017	2019
United States	AIM-9X Sidewinder	long-range air-to-air missile	14	2017	2018
United States	C-130J	transport aircraft	5	2019	2023
United States	Bell-505 Jet Ranger X	light helicopter	3	2020	2021
United States	F-16A	FGA aircraft	9	1986	1990
United States	PA-28	light aircraft	5	2019	2019
United States	AGM-65 Maverick	air-to-surface missile	18	2017	2020
United States	Model-300	light helicopter	2	2012	2012

United States	Cessna-180 Skywagon	light aircraft	2	2010	2011
United States	100 F	turbofan	4	2011	2014
United States	AIM-9J/P Sidewinder	short-range air-to-air missile	50	1986	1990
United States	TA-4J Skyhawk	trainer aircraft	2	1998	1999
United States	APG-66	combat aircraft radar	16	1996	1999
United States	APG-66	combat aircraft radar	16	1993	1996
United States	F-5E Tiger-2	FGA aircraft	1	1996	2006
United States	AIM-120C AMRAAM	long-range air-to-air missile	36	2017	2019
United States	ship engine	ship engine	8	2000	2002
United States	MPQ-64	air-search radar	2	2017	2020
United States	AIM-120C AMRAAM	long-range air-to-air missile	200	2017	2020
United States	vehicle engine	vehicle engine	5	2018	2019
United States	aircraft engine	aircraft engine	32	1990	1994
United States	ScanEagle	UAV	6	2018	2021
United States	Bell-412	helicopter	9	2018	2020
United States	vehicle engine	vehicle engine	23	2019	2024
United States	vehicle engine	vehicle engine	20	1997	1998
United States	Bonanza	light aircraft	4	2013	2013
United States	ship engine	ship engine	2	2002	2003
United States	ship engine	ship engine	8	2006	2007
United States	404 F	turbofan	16	2011	2013

Appendice C: Transfers of Major Conventional Arms from France to Malaysia (1990-2024)

Weapon	Weapon description	Nb	Order	Delivery
Eryx	anti-tank missile	74	2000	2000
AS-555SN Fennec	anti-submarine helicopter	6	2001	2003
MM-40 Exocet	anti-ship missile	30	2002	2003
Ocean Master	maritime patrol aircraft radar	2	2001	2003
Damocles	aircraft electro-optical system	8	2004	2007
SM-39 Exocet	anti-ship missile	40	2002	2008
Scorpene	submarine	1	2002	2009
2R2M 120mm	mortar	8	2010	2010
H725 Caracal	transport helicopter	12	2010	2012
Ground Master-400	air-search radar	1	2008	2013
EC-120 Colibri	light helicopter	3	2015	2016
Ground Master-200	air-search radar	1	2015	2016
2R2M 120mm	mortar	8	2011	2018
LG1 105mm	towed gun	18	2018	2020

Appendice D: Transfers of Major Conventional Arms to Malaysia (1990-2024)

Supplier	Weapon designation	Weapon description	Nb	Order	Delivery
United Kingdom	Javelin	portable SAM	60	1988	1991
United Kingdom	Hawk-100	trainer/combat aircraft	10	1990	1994
United Kingdom	Hawk-200	FGA aircraft	18	1990	1994
United Kingdom	Martello	air-search radar	2	1990	1992
United States	C-130H Hercules	transport aircraft	1	1990	1991
United States	APG-66	combat aircraft radar	18	1990	1994
United States	King Air Maritime	maritime patrol aircraft	4	1991	1994
France	TSM-2633 Spherion	anti-submarine sonar	2	1992	1999
Germany	ship engine	ship engine	8	1992	1999
Italy	A244	anti-submarine torpedo	75	1992	1997
Netherlands	DA-08	air-search radar	2	1992	1999
Sweden	Sea Giraffe-150	air-search radar	2	1992	1999
Sweden	SAK-70 Mk-2 57mm	naval gun	2	1992	1999
United Kingdom	Lekiu/FS-2000	frigate	2	1992	1999
France	MM-40 Exocet	anti-ship missile	20	1993	1996
Germany	vehicle engine	vehicle engine	111	1993	1993
South Korea	K-200 KIFV	armoured personnel carrier	42	1993	1993
Switzerland	MD-3-160	trainer aircraft	20	1993	1995
United Kingdom	Seawolf	SAM	34	1993	1998
United Kingdom	Starburst	portable SAM	504	1993	1995
United Kingdom	FH-70 155mm	towed gun	3	1993	1994
United States	F/A-18C Hornet	FGA aircraft	8	1993	1997
United States	AGM-65 Maverick	air-to-surface missile	30	1993	1997
United States	AIM-7M Sparrow	long-range air-to-air missile	20	1993	1997
United States	AIM-9M Sidewinder	short-range air-to-air	40	1993	1997
Russia	R-73	short-range air-to-air	150	1994	1995
Russia	MiG-29S	FGA aircraft	18	1994	1995
South Korea	K-200 KIFV	armoured personnel carrier	22	1994	1995
Ukraine	R-27R/T	long-range air-to-air missile	131	1994	1995
United States	Harpoon Block-1	anti-ship missile	25	1994	1997
United States	Newport	landing ship	1	1994	1995
France	Eryx	anti-tank missile	200	1995	1996

Germany	ASO-84	anti-submarine sonar	2	1995	1997
Germany	ship engine	ship engine	8	1995	1997
Indonesia	CN-235	transport aircraft	6	1995	1999
Italy	Assad	corvette	2	1995	1997
Italy	Aspide	long-range air-to-air missile/SAM	20	1995	1997
Italy	Otomat-2	anti-ship missile	12	1995	1998
South Korea	K-200 KIFV	armoured personnel carrier	47	1995	1995
United Kingdom	air refuel system	air refuel system	2	1995	1997
United States	aircraft engine	aircraft engine	12	1995	1999
United States	C-130H Hercules	transport aircraft	5	1995	1995
Italy	RAT-31S	air-search radar	2	1996	1998
Germany	ASO-84	anti-submarine sonar	2	1997	1999
Germany	ship engine	ship engine	8	1997	1999
Italy	Assad	corvette	2	1997	1999
Italy	Otomat-2	anti-ship missile	12	1997	2000
Italy	Aspide	long-range air-to-air missile/SAM	20	1997	1999
Germany	MEKO-A100	patrol ship/frigate	6	1999	2006
Russia	Mi-17	transport helicopter	2	1999	1999
Russia	N019ME Topaz	combat aircraft radar	17	1999	2002
Sweden	ARTHUR	artillery locating radar	2	1999	2000
United Kingdom	Super Lynx	anti-submarine helicopter	6	1999	2003
United States	aircraft engine	aircraft engine	12	1999	2003
Australia	Eagle-ARV	light aircraft/UAV	3	2000	2001
Brazil	AV-VBL	armoured personnel carrier	10	2000	2002
Canada	aircraft engine	aircraft engine	9	2000	2001
France	Eryx	anti-tank missile	74	2000	2000
Germany	vehicle engine	vehicle engine	5	2000	2001
Italy	TMX	fire-control radar	6	2000	2006
Italy	Super Rapid 76mm	naval gun	6	2000	2006
South Africa	G-5 155mm	towed gun	22	2000	2001
Switzerland	PC-7 Turbo Trainer	(armed) trainer aircraft	9	2000	2001
Turkiye	AIFV	infantry fighting vehicle	44	2000	2002
Turkiye	AIFV-APC	armoured personnel carrier	167	2000	2002
United Kingdom	air refuel system	air refuel system	2	2000	2002
United States	ship engine	ship engine	12	2000	2006

United States	vehicle engine	vehicle engine	211	2000	2002
United States	Sharpshooter	infantry fighting vehicle	31	2000	2002
Brazil	ASTROS-2	multiple rocket launcher	18	2001	2002
France	AS-555SN Fennec	anti-submarine helicopter	6	2001	2003
France	Ocean Master	maritime patrol aircraft	2	2001	2003
Italy	RAT-31DL	air-search radar	1	2001	2003
Italy	Otomat-2	anti-ship missile	24	2001	2002
Pakistan	QW-1 Vanguard	portable SAM	160	2001	2002
Pakistan	Red Arrow-8	anti-tank missile	450	2001	2002
Russia	Metis-M	anti-tank missile	100	2001	2001
Switzerland	Fieldguard	fire-control radar	3	2001	2002
United Kingdom	Sea Skua	anti-ship missile	50	2001	2007
United States	RDR-1500	maritime patrol aircraft	6	2001	2003
France	MM-40 Exocet	anti-ship missile	30	2002	2003
France	SM-39 Exocet	anti-ship missile	40	2002	2008
France	Scorpene	submarine	1	2002	2009
Germany	ship engine	ship engine	8	2002	2009
Indonesia	CN-235	transport aircraft	2	2002	2005
Italy	Black Shark	anti-ship/anti-submarine torpedo	30	2002	2009
Russia	Igla-1	portable SAM	382	2002	2002
Spain	Scorpene	submarine	1	2002	2009
United Kingdom	Jernas	SAM system	3	2002	2005
United Kingdom	Rapier-2	SAM	150	2002	2005
United Kingdom	Blindfire	fire-control radar	3	2002	2006
United States	aircraft engine	aircraft engine	4	2002	2005
Italy	A-109K	light helicopter	11	2003	2005
Poland	PT-91M	tank	48	2003	2007
Poland	WZT-4	armoured recovery vehicle	6	2003	2007
Poland	PMC-90	armoured bridgelayer	5	2003	2007
Poland	MID-M	armoured engineer vehicle	3	2003	2010
Russia	KAB-500/1500	guided bomb	50	2003	2007
Russia	Su-30MK	FGA aircraft	18	2003	2007
Russia	Kh-29	air-to-surface missile	25	2003	2007
Russia	Kh-31A1	anti-ship/anti-radar missile	150	2003	2007
Russia	R-27R/T	long-range air-to-air missile	150	2003	2007

Russia	R-73	short-range air-to-air	150	2003	2007
France	Damocles	aircraft electro-optical	8	2004	2007
Germany	vehicle engine	vehicle engine	32	2004	2004
Germany	TP400-D6	turboprop	16	2005	2015
Germany	TRML-3D	air-search radar	2	2005	2008
Spain	A400M Atlas	transport aircraft	4	2005	2015
United Kingdom	air refuel system	air refuel system	4	2005	2015
United States	Harpoon Block-1	anti-ship missile	4	2005	2006
United States	AIM-120C	long-range air-to-air missile	20	2005	2007
Canada	aircraft engine	aircraft engine	10	2006	2007
Italy	MB-339C	trainer/combat aircraft	8	2006	2009
Switzerland	PC-7 Turbo Trainer	(armed) trainer aircraft	10	2006	2007
United Kingdom	Viper	turbojet	8	2006	2009
Brazil	ASTROS-2	multiple rocket launcher	18	2007	2010
Switzerland	Fieldguard-3	fire-control radar	3	2007	2010
United Kingdom	Seawolf	SAM	31	2007	2010
China	FN-6	portable SAM	64	2008	2009
France	Ground Master-400	air-search radar	1	2008	2013
Turkiye	ACV-S	armoured personnel carrier	8	2008	2010
Turkiye	AIFV	infantry fighting vehicle	28	2008	2010
Turkiye	AIFV-APC	armoured personnel carrier	20	2008	2010
United States	vehicle engine	vehicle engine	56	2008	2010
Germany	DSQS-24	anti-submarine sonar	2	2009	2013
Netherlands	MIRADOR	electro-optical system	2	2009	2013
South Korea	Barracuda	armoured personnel carrier	20	2009	2009
United States	JDAM	guided bomb	50	2009	2011
France	H725 Caracal	transport helicopter	12	2010	2012
France	2R2M 120mm	mortar	8	2010	2010
Germany	vehicle engine	vehicle engine	257	2010	2014
United States	Paveway	guided bomb	60	2010	2011
France	2R2M 120mm	mortar	8	2011	2018
Netherlands	SQUIRE	ground surveillance radar	24	2011	2017
South Korea	Gagah Samudera	patrol ship/training ship	2	2011	2017
Turkiye	Pars IFV-25	infantry fighting vehicle	46	2011	2014
Turkiye	Pars IFV-30	infantry fighting vehicle	88	2011	2017
Turkiye	Pars	armoured personnel carrier	123	2011	2016

Russia	R-77	long-range air-to-air missile	35	2012	2012
South Africa	ZT-3 Ingwe	anti-tank missile	216	2012	2016
South Africa	LCT-30	infantry fighting vehicle	78	2012	2017
United States	RDR-1700	maritime patrol aircraft	4	2012	2014
United States	King Air	light transport aircraft	2	2012	2013
United States	ASQ-228 ATFLIR	aircraft electro-optical	6	2012	2016
United States	ScanEagle	UAV	2	2012	2013
Canada	aircraft engine	aircraft engine	5	2013	2016
United States	AIM-9X Sidewinder	long-range air-to-air missile	20	2013	2015
Brunei	S-70 Black Hawk	transport helicopter	4	2014	2016
Switzerland	PC-7 Turbo Trainer	(armed) trainer aircraft	5	2014	2016
France	EC-120 Colibri	light helicopter	3	2015	2016
France	Ground Master-200	air-search radar	1	2015	2016
Thailand	First Win	armoured personnel carrier	20	2015	2016
United Kingdom	Starstreak	SAM	150	2015	2016
United Kingdom	Forceshield	SAM system	1	2015	2016
United States	AIM-120C	long-range air-to-air missile	10	2015	2016
United States	vehicle engine	vehicle engine	20	2015	2016
Denmark	Scanter-6000	air/sea-search radar	2	2016	2017
United States	MD-530G	combat helicopter	6	2016	2022
China	LMS-68	patrol ship	4	2017	2019
UAE	Guardian	armoured personnel carrier	9	2017	2017
Austria	Camcopter S-100	UAV	2	2018	2018
France	LG1 105mm	towed gun	18	2018	2020
Norway	NSM	anti-ship missile	48	2018	2021
United States	ship engine	ship engine	8	2018	2019
United States	ScanEagle	UAV	12	2019	2020
Italy	AW139	helicopter	3	2020	2022
United States	APS-143(V)	maritime patrol aircraft	3	2020	2022
Turkiye	Ejder Yalcin	armoured personnel carrier	20	2022	2023
United States	vehicle engine	vehicle engine	20	2022	2023

Appendice E: Transfers of Major Conventional Arms from France to Singapore (1990-2024)

Weapon	Weapon description	Nb	Order	Delivery
MILAN	anti-tank missile	308	1996	2000
Master	air-search radar	1	1997	2000
La Fayette	frigate	6	2000	2007
ASTER-15 SAAM	SAM	300	2001	2006
EC-120 Colibri	light helicopter	5	2005	2006
Ground Master-200	air-search radar	3	2012	2012
SAMP/T	ABM/SAM system	2	2013	2017
ASTER-30	SAM	200	2013	2017
VL-MICA-M	naval SAM system	8	2013	2017
MICA	long-range air-to-air missile	150	2013	2017
Higuard	armoured personnel carrier	51	2014	2014
Sherpa	armoured personnel carrier	60	2014	2015
A-330 MRTT	tanker/transport aircraft	6	2014	2018
H725 Caracal	transport helicopter	18	2016	2021

Appendice F: Transfers of Major Conventional Arms to Singapore (1990-2024)

Supplier	Weapon designation	Weapon description	Nb	Order	Delivery
France	Mistral	portable SAM	500	1992	1994
France	La Fayette	frigate	6	2000	2007
France	SAMP/T	ABM/SAM system	2	2013	2017
France	EC-120 Colibri	light helicopter	5	2005	2006
France	AS-350/AS-550 Fennec	light helicopter	20	1990	1991
France	Higuard	armoured personnel	51	2014	2014
France	AS-532 Cougar	transport helicopter	14	1989	1990
France	Sherpa	armoured personnel	60	2014	2015
France	ASTER-15	SAM	300	2001	2006
France	A-330 MRTT	tanker/transport aircraft	6	2014	2018
France	TSM-2064	anti-submarine sonar	6	1986	1990
France	Ground Master-200	air-search radar	3	2012	2012
France	ASTER-30	SAM	200	2013	2017
France	MILAN	anti-tank missile	200	1989	1990
France	LG1 105mm	towed gun	37	1990	1992
France	AMX-10P	infantry fighting vehicle	22	1990	1993
France	AMX-10PAC-90	infantry fighting vehicle	22	1990	1993
France	Master	air-search radar	2	1997	1999
France	MILAN	anti-tank missile	671	1996	1997
France	Gudgeon	anti-submarine sonar	6	1993	1996
France	H725 Caracal	transport helicopter	18	2016	2021
France	VL-MICA-M	naval SAM system	8	2013	2017
France	MICA	long-range air-to-air	150	2013	2017
Germany	ship engine	ship engine	24	2000	2007
Germany	Leopard-2A4	tank	45	2012	2016
Germany	Leopard-2A4	tank	158	2007	2007
Germany	ship engine	ship engine	16	2013	2017
Germany	PSB-2	armoured bridgelayer	10	2010	2012
Germany	MGB-62	corvette	6	1986	1990
Germany	vehicle engine	vehicle engine	220	2017	2019

Germany	Buffel	armoured recovery	19	2007	2010
Germany	Type-218	submarine	2	2013	2023
Germany	ship engine	ship engine	24	1993	1996
Italy	M-346 Master	trainer/combat aircraft	12	2010	2012
Italy	Black Shark	anti-ship/anti-submarine torpedo	50	2007	2011
Italy	A244	anti-submarine torpedo	50	1991	1994
Italy	A244	anti-submarine torpedo	100	1993	1996
Italy	A244	anti-submarine torpedo	100	2000	2007
Italy	Grifo	combat aircraft radar	40	1992	1998
Italy	A244	anti-submarine torpedo	100	1986	1990
Italy	Super Rapid 76mm	naval gun	6	1986	1990
Italy	Super Rapid 76mm	naval gun	12	1993	1996
Italy	Super Rapid 76mm	naval gun	8	2013	2017
Italy	Super Rapid 76mm	naval gun	6	2000	2007
Netherlands	NS-100	air/sea-search radar	8	2013	2017
Netherlands	STIR	fire-control radar	6	2011	2013
Netherlands	Fokker-50 Enforcer-2	anti-submarine aircraft	5	1991	1994
Netherlands	Fokker-50	transport aircraft	4	1991	1993
Netherlands	WM-20	fire-control radar	4	1991	1995
Russia	Igla	portable SAM	350	1997	1998
South Africa	Round Table	landing ship	1	1992	1992
South Africa	Marauder	armoured personnel	257	2013	2016
Sweden	ARTHUR	artillery locating radar	3	1999	2003
Sweden	Sjöormen	submarine	1	1995	1997
Sweden	Sjöormen	submarine	3	1997	2000
Sweden	Västergotland	submarine	2	2005	2011
Sweden	RBS-70 Mk-3 Bolide	portable SAM	50	2018	2019
Sweden	Giraffe-AMB	air-search radar	6	2010	2011
Sweden	Type-43	anti-submarine torpedo	30	1997	2000

Sweden	RBS-70 Mk-3 Bolide	portable SAM	50	2009	2011
Sweden	Sea Giraffe-150	air-search radar	6	1986	1990
Sweden	Giraffe-AMB	air-search radar	2	1998	1999
Sweden	Type-613	anti-ship torpedo	80	1997	2000
Sweden	Landsort	minehunter	4	1991	1995
Switzerland	PC-21	trainer aircraft	19	2006	2008
Switzerland	PiPz-3 Kodiak	armoured engineer	13	2012	2014
Switzerland	Skyguard	air-search/fire-control	12	1991	1991
United Kingdom	Rapier-2	SAM	250	1994	1998
United Kingdom	Rapier-2000	SAM system	12	1994	1998
United Kingdom	CET	armoured engineer	18	1993	1994
United Kingdom	CET	armoured engineer	18	1995	1996
United Kingdom	Trent-700	turbofan	12	2014	2018
United Kingdom	air refuel system	air refuel system	6	2014	2018
United Kingdom	ship engine	ship engine	8	1994	2000
United States	TPQ-53	artillery locating radar	6	2017	2021
United States	F-16A	FGA aircraft	9	1992	1993
United States	-124 F	turbofan	24	2010	2012
United States	JDAM	guided bomb	917	2015	2016
United States	KC-135 Stratotanker	tanker/transport aircraft	4	1997	1999
United States	Gulfstream-5	light transport aircraft	1	2008	2012
United States	GBU-39 SDB	guided glide bomb	250	2017	2020
United States	AIM-9X Sidewinder	long-range air-to-air missile	20	2014	2015
United States	SH-60B	anti-submarine	6	2005	2009
United States	F-16C Block-50/52	FGA aircraft	12	1996	1997
United States	JDAM	guided bomb	670	2010	2011
United States	JDAM	guided bomb	35	2009	2010
United States	vehicle engine	vehicle engine	1400	2000	2001
United States	F-15E Strike	FGA aircraft	8	2010	2013
United States	Gulfstream-5	light transport aircraft	4	2007	2009
United States	M-109 chassis	self-propelled gun	54	2001	2001
United States	vehicle engine	vehicle engine	257	2013	2016

United States	AH-64D Apache Longbow	combat helicopter	12	2001	2005
United States	F-15E Strike	FGA aircraft	12	2007	2010
United States	AAQ-33 Sniper ATP	aircraft electro-optical system	24	2006	2009
United States	JDAM	guided bomb	50	2006	2009
United States	Paveway	guided bomb	84	2007	2009
United States	HIMARS	multiple rocket launcher	18	2008	2010
United States	AAQ-33 Sniper ATP	aircraft electro-optical system	20	2008	2010
United States	EDO-980	anti-submarine sonar	6	2000	2007
United States	vehicle engine	vehicle engine	200	1985	1990
United States	APG-78	combat helicopter radar	8	2000	2002
United States	APG-78	combat helicopter radar	12	2001	2005
United States	MaxxPro	armoured personnel	15	2009	2009
United States	CH-47D	transport helicopter	2	1999	2000
United States	Paveway	guided bomb	124	2012	2014
United States	ScanEagle	UAV	12	2011	2012
United States	SH-60B	anti-submarine	2	2013	2018
United States	AGM-65 Maverick	air-to-surface missile	50	1991	1992
United States	F-15E Strike	FGA aircraft	12	2005	2009
United States	AGM-65 Maverick	air-to-surface missile	57	2003	2005
United States	Tiger Eyes	aircraft electro-optical system	24	2006	2009
United States	AIM-120C AMRAAM	long-range air-to-air missile	100	2006	2009
United States	APG-83 SABR	combat aircraft radar	70	2015	2021
United States	Paveway	guided bomb	124	2017	2019
United States	Harpoon	anti-ship missile	84	1986	1990
United States	BGM-71 TOW	anti-tank missile	200	1990	1995
United States	TPQ-37	artillery locating radar	3	1989	1990
United States	A-4B Skyhawk	FGA aircraft	24	1989	1990
United States	Harpoon	anti-ship missile	20	1991	1994
United States	AIM-7M	long-range air-to-air	50	1994	1997

United States	F-16C Block-50/52	FGA aircraft	18	1994	1998
United States	AIM-9M Sidewinder	short-range air-to-air missile	36	1994	1998
United States	CH-47D	transport helicopter	6	1994	1996
United States	TPS-77	air-search radar	1	1993	1997
United States	AH-64D Apache Longbow	combat helicopter	8	1999	2002
United States	AGM-114 Hellfire-2	anti-tank/air-to-surface missile	192	2001	2005
United States	CH-47D	transport helicopter	6	1998	2000
United States	F-16C Block-50/52	FGA aircraft	12	1997	1999
United States	S-211	trainer/combat aircraft	2	1994	1995
United States	AIM-120C AMRAAM	long-range air-to-air missile	100	2001	2002
United States	S-70 Black	transport helicopter	2	2000	2002
United States	F-16C Block-50/52	FGA aircraft	20	2000	2004
United States	CH-47D	transport helicopter	2	1999	2001
United States	AIM-7M	long-range air-to-air	20	2000	2001
United States	AIM-9M Sidewinder	short-range air-to-air missile	60	2000	2001
United States	AIM-120C AMRAAM	long-range air-to-air missile	50	2004	2006
United States	AAQ-13 LANTIRN	combat aircraft radar	5	1996	1999
United States	AAQ-14 LANTIRN	aircraft electro-optical system	5	1996	1999
United States	AAQ-13 LANTIRN	combat aircraft radar	18	2001	2004
United States	GMLRS	guided rocket	348	2014	2015
United States	CH-47F	transport helicopter	16	2016	2021
United States	vehicle engine	vehicle engine	1000	1995	1996
United States	Harpoon	anti-ship missile	24	1996	1997
United States	AIM-120C AMRAAM	long-range air-to-air missile	100	2014	2016

United States	AIM-120C AMRAAM	long-range air-to-air missile	200	2008	2013
United States	vehicle engine	vehicle engine	450	2009	2010
United States	GMLRS	guided rocket	264	2008	2010
United States	vehicle engine	vehicle engine	500	1995	1997
United States	F-15E Strike	FGA aircraft	8	2014	2016
United States	AGM-154	guided glide bomb	60	2008	2008
United States	AIM-9X Sidewinder	long-range air-to-air missile	200	2007	2009

List of Military Items

Appendice G: Armoured Personnel Carriers and Light Armoured Vehicles

- VBL (Véhicule blindé léger)

- VAB (Véhicule de l'avant blindé)

- Sherpa

- Higuard

Appendice H: Artillery Systems

- 2R2M (Mortier de 120 mm Rayé/Embarqué)
- LG1 Mark II (105mm towed howitzer)
- CAESAR (self-propelled howitzer)

Appendice I: Helicopters

- Alouette-2

- Alouette-3

- Puma

- EC-120 Colibri

- Caracal (H225M)

Appendice J: Missiles

Anti-Tank and Short-Range

- MILAN (anti-tank guided missile)
- Mistral (MANPADS, short-range SAM)

Air-to-Air and Surface-to-Air

- Exocet MM-38 (anti-ship missile)
- MICA (air-to-air missile)
- VL-MICA-M (vertical launch SAM)
- ASTER-15 (surface-to-air missile)
- SAMP/T (medium-range SAM system)

Appendice K: Naval Systems

- La Fayette-class frigate

- Scorpene (attack submarine)

- Ground Master 200 (mobile air defense radar)

- Ground Master 400 (long-range air defense radar)

Appendice M: Transport and Tanker Aircraft

- A330 MRTT (multi-role tanker transport)

Appendice N: Combat Aircraft

- Rafale (multirole fighter)