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THE TRANSFORMATION OF THE U.S.–PHILIPPINES DEFENSE RELATIONSHIP (2021–2024)

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ABSTRACT

The period from 2021 to 2024 marked a significant transformation in the U.S.–Philippines defense relationship amid intensifying U.S.–China strategic competition and growing tensions in the South China Sea (known in Vietnam as the East Sea). Rather than merely representing the restoration of a traditional alliance, this transformation reflected a broader strategic realignment shaped by evolving regional security dynamics and changing foreign policy priorities in both Washington and Manila. This article examines the drivers, manifestations, and implications of this transformation for the bilateral alliance and the regional security order in Southeast Asia. Drawing upon official government documents, bilateral defense agreements, policy statements, and relevant scholarly literature, the study employs historical and policy analysis to investigate key dimensions of defense cooperation, including the expansion and implementation of the Enhanced Defense Cooperation Agreement (EDCA), the U.S. military presence, joint military exercises, high-level defense dialogues, and U.S. support for the modernization of the Armed Forces of the Philippines. The article argues that the transformation of the U.S.–Philippines defense relationship was driven by the convergence of three major factors: the intensifying strategic rivalry between the United States and China, mounting maritime security challenges in the South China Sea, and the Marcos Jr. administration's recalibration of the Philippines' foreign and defense policy. These factors facilitated a shift from the policy uncertainty that characterized the final years of the Duterte administration to a renewed phase of strategic alignment under President Ferdinand Marcos Jr. This transformation was reflected in the expansion of EDCA sites, the unprecedented scale of the Balikatan exercises, strengthened institutional defense cooperation, and more intensive strategic coordination between the two allies. The article concludes that the renewed U.S.–Philippines defense partnership has significantly enhanced the Philippines' defense capabilities and deterrence posture while simultaneously reinforcing the United States' Indo-Pacific strategy. More broadly, the study argues that the transformation of the alliance has become an important factor reshaping the strategic balance and regional security architecture in Southeast Asia, with implications extending beyond bilateral relations to the evolving geopolitical order in the Indo-Pacific.

KEYWORDS: United States; Philippines; international relations; defense cooperation; South China Sea

1. INTRODUCTION

Entering the third decade of the 21st century, the Indo-Pacific region continues to emerge as a significant strategic competition space in international relations. In this context, Southeast Asia in general and the Philippines in particular hold an important position due to their location bordering the South China Sea and the Western Pacific. With this strategic position, the Philippines is not only a Southeast Asian country directly involved in disputes in the South China Sea but also an longstanding treaty ally of the United States in the region. Therefore, changes in the defence relations between the United States and the Philippines have implications beyond bilateral ties, affecting the regional security architecture and the dynamics of strategic competition among major powers.

Before 2021, the US-Philippines alliance experienced many fluctuations, especially during President Rodrigo Duterte's administration. Duterte's government pursued a more independent foreign policy, aimed at diversifying international relations and improving ties with China. However, despite political disagreements and at certain points Manila threatening to terminate the Visiting Forces Agreement (VFA), military cooperation between the two countries was maintained, particularly in counter-terrorism, maritime security, joint exercises, and supporting the modernisation of the Philippine armed forces. This demonstrates that defence remains the most stable and sustainable pillar of the US-Philippines relationship.

From 2021 onwards, defence relations entered a phase of recovery following the impacts of the Covid-19 pandemic and previous instability. Notably, since President Ferdinand Marcos Jr. took office in June 2022, Manila has shown a clearer tendency to strengthen its alliance with Washington. Unlike his predecessor Duterte, Marcos Jr., although pursuing a balanced foreign policy, leans more towards cooperation with the United States, viewing Washington as a long-term and reliable ally. As a result, US-Philippines defence relations have seen positive developments, including the expansion of the Enhanced Defence Cooperation Agreement (EDCA), allowing the US military access to additional strategic military sites in the Philippines, increasing joint exercises, restoring high-level dialogue mechanisms, promoting multilateral cooperation, and supporting the modernisation of the Philippine armed forces.

On an academic level, US-Philippines relations have attracted considerable interest from scholars both domestically and internationally. International studies often focus on the role of the Philippines in the US regional strategy, the evolution of the US-Philippines alliance, the impact of the South China Sea disputes, as well as the rise of multilateral and minilateral cooperation mechanisms. However, there is a need for updated research, especially focusing on the period 2021-2024, when bilateral defence

relations have been strongly recovering under the Biden and Marcos Jr. administrations, closely linked to security developments in the South China Sea.

Against this backdrop, this article concentrates on analysing US-Philippines defence relations during 2021-2024. The study clarifies the main manifestations of bilateral defence cooperation, including US military presence in the Philippines, joint exercises, defence dialogue mechanisms, cooperation within multilateral frameworks, and support for the modernisation of the Philippine armed forces. Based on this, the article aims to identify the characteristics, trends, and impacts of US-Philippines defence relations on the regional security environment, particularly in Southeast Asia and the South China Sea.

2. RESEARCH METHODOLOGY

This study employs a qualitative research approach, primarily based on documentary analysis and the examination of secondary sources concerning U.S.–Philippines defense relations during the 2021–2024 period. The sources include official documents, joint statements, policy reports, scholarly publications, specialized studies, and event-based data on bilateral defense cooperation, with particular attention to military presence, joint military exercises, defense dialogues, the implementation of the Enhanced Defense Cooperation Agreement (EDCA), multilateral defense cooperation, and U.S. support for the modernization of the Armed Forces of the Philippines.

In terms of specific research methods, the study adopts the historical method to reconstruct the evolution of U.S.–Philippines defense relations from 2021 to 2024, tracing developments from the post-COVID-19 recovery period to the subsequent consolidation of the alliance under the administrations of President Joe Biden and President Ferdinand Marcos Jr. In addition, the analytical–synthetical method is employed to systematize major events, policy developments, and defense cooperation activities, thereby identifying the principal characteristics and trends of bilateral defense relations

Furthermore, the study applies the comparative method to examine the changes in U.S.–Philippines defense relations between the final phase of President Rodrigo Duterte's administration and the Marcos Jr. administration. It also draws on foreign policy analysis and the systems–structural approach to situate bilateral defense relations within the broader context of strategic competition in the Indo-Pacific, developments in the South China Sea, and the evolving regional security architecture.

3. RESULTS AND DISCUSSION

3.1. The Recovery of U.S.–Philippines Defense Relations (2021-2024)

U.S.–Philippines defense relations experienced a marked recovery during the 2021-2024 period following a phase shaped by the combined effects of the COVID-19 pandemic and shifts in the Philippines' foreign policy under President Rodrigo Duterte. Although the alliance's core legal foundations - including the 1951 Mutual Defense Treaty (MDT), the Visiting Forces Agreement (VFA), and the Enhanced Defense Cooperation Agreement (EDCA) - remained in force, the 2016-

2020 period was characterized by considerable uncertainty in bilateral defense relations. Manila's pursuit of a more independent foreign policy, together with the possibility of terminating the VFA, raised concerns regarding the long-term stability of the alliance. At the same time, the COVID-19 pandemic disrupted numerous military cooperation activities, high-level exchanges, and joint exercises, resulting in a significant slowdown in bilateral defense cooperation.

Beginning in 2021, U.S.–Philippines defense relations gradually recovered amid an increasingly complex regional security environment. The Philippine government's decision to maintain the VFA removed one of the principal obstacles to bilateral military cooperation and reaffirmed the legal basis for U.S. training activities, joint exercises, and force deployments in the Philippines. Concurrently, Washington repeatedly reaffirmed its commitment to the 1951 Mutual Defense Treaty and emphasized the strategic importance of the Philippines within the Indo-Pacific regional architecture. These developments strengthened strategic trust between the two allies and laid the groundwork for restoring defense cooperation mechanisms that had weakened during the preceding period.

The recovery gained significant momentum following the inauguration of President Ferdinand Marcos Jr. in June 2022. The Marcos Jr. administration reoriented Philippine foreign policy toward strengthening relations with its traditional allies and partners, with the United States continuing to be regarded as a key strategic partner in advancing the modernization of the Armed Forces of the Philippines and enhancing the country's defense capabilities. On the U.S. side, the administration of President Joe Biden continued to prioritize the reinforcement of its alliance and partnership network across the Indo-Pacific in response to growing regional security challenges. The convergence of strategic interests between Washington and Manila therefore created renewed momentum for restoring and expanding bilateral defense cooperation across multiple dimensions.

The recovery of U.S.–Philippines defense relations was reflected not only in the reactivation of previously weakened mechanisms of cooperation but also in the strategic reassessment undertaken by both countries. Against the backdrop of intensifying major-power competition, particularly in the South China Sea and the broader Indo-Pacific, both Washington and Manila viewed the strengthening of their alliance as essential to safeguarding their respective national security interests. For the United States, the Philippines remained a key treaty ally and a strategically important location for sustaining its military presence in the Western Pacific. For the Philippines, the alliance with the United States contributed to strengthening deterrence, supporting the modernization of its armed forces, and enhancing its capacity to address emerging maritime security challenges.

Overall, the 2021-2024 period marked a relatively comprehensive recovery of U.S.–Philippines defense relations following several years of uncertainty and reduced cooperation. This recovery not only restored bilateral defense cooperation to a more stable trajectory but also laid the foundation for a deeper and more comprehensive phase in the development of the alliance. Building upon this

renewed momentum, defense cooperation between the two countries expanded in scope, scale, and depth, as reflected in a series of concrete initiatives and activities discussed in the following section.

3.2. Manifestations of the Recovery and Strengthening of U.S.–Philippines Defense Relations (2021–2024)

Beginning in 2021, U.S.–Philippines defense relations gradually recovered following the disruption caused by the COVID-19 pandemic. In particular, after President Ferdinand Marcos Jr. assumed office in 2022, bilateral defense cooperation underwent a marked transformation, as reflected in the expanded U.S. military presence in the Philippines, the increased scale of joint military exercises, the resumption of high-level defense dialogue mechanisms, the promotion of multilateral defense cooperation, and enhanced U.S. support for the modernization of the Armed Forces of the Philippines (AFP).

3.2.1. The Expansion of the U.S. Military Presence in the Philippines

Table 1.1: Major U.S. Military Visits and Deployments to the Philippines (2021–2024)

Year	Major Events
2021	- August: USS Charleston (LCS-18) made a port call in Manila, marking the U.S. Navy's first official visit to the Philippines since 2019.
2022	- 24 February: USS Tulsa (LCS-16) made a port call in Manila, coinciding with the visit of Vice Admiral Karl Thomas. - 14 October: USS Ronald Reagan and USS Chancellorsville visited the Philippines. - November: U.S. Vice President Kamala Harris visited the Philippines, during which the expansion of the Enhanced Defense Cooperation Agreement (EDCA) through the addition of four new agreed locations was announced.
2023	- April: The two governments announced four additional EDCA sites accessible to U.S. forces. - Other visits included USS Chung-Hoon, Patrol Squadrons VP-10 and VP-16, and the U.S. Coast Guard cutter Frederick Hatch.

2024	- January: The USS Carl Vinson (CVN-70) Carrier Strike Group visited the Port of Manila. - December: U.S. Air Force A-10 Thunderbolt II aircraft were deployed to Clark Air Base to conduct joint training with the Philippine Air Force.
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Source: Compiled by the author based on data from the U.S. Pacific Fleet, Manila Bulletin, Reuters, the U.S. Embassy in the Philippines, the U.S. Navy, the U.S. Coast Guard, and official information on the implementation of the Enhanced Defense Cooperation Agreement (EDCA) published by the U.S. Embassy in the Philippines.

One of the most notable features of U.S.–Philippines defense relations during the 2021–2024 period was the significant expansion of the U.S. military presence in the Philippines. The legal basis for this presence is provided by the Visiting Forces Agreement (VFA) and the Enhanced Defense Cooperation Agreement (EDCA), which permit the rotational deployment of U.S. forces, access to designated Philippine military facilities, and the conduct of training activities, military exercises, humanitarian assistance, and disaster relief operations.

The year 2021 can be regarded as a period of re-engagement in bilateral defense relations following the disruption caused by the COVID-19 pandemic. The arrival of the littoral combat ship USS Charleston in Manila in August 2021 marked the first official visit by a U.S. Navy vessel to the Philippines since 2019 [2]. Although military activities remained limited in scale because of pandemic-related restrictions, this event demonstrated the commitment of both countries to maintaining substantive military cooperation. During the same period, the Philippines' decision to suspend the termination of the VFA preserved the essential legal framework for rotational deployments, military training, and broader defense cooperation between the two countries. These developments indicate that, despite the constraints imposed by the pandemic, U.S.–Philippines defense cooperation had entered a phase of recovery, laying the groundwork for its subsequent expansion under the administration of President Ferdinand Marcos Jr. from 2022 onward.

The year 2022 marked an important turning point in U.S.–Philippines defense relations following the inauguration of President Ferdinand Marcos Jr., whose administration adopted a policy of restoring and strengthening the alliance with Washington. Against the backdrop of defense cooperation that had previously been disrupted by the COVID-19 pandemic, the two countries rapidly resumed bilateral military cooperation on a larger scale and with greater intensity. The port call of USS Tulsa, the visit of the USS Ronald Reagan Carrier Strike Group, and the deployment of U.S. Marine Corps forces as part of Exercise Balikatan demonstrated Washington's gradual restoration of its military presence in the Philippines [3], [4], [5]. In addition to the expansion of U.S. military presence, 2022 also witnessed important progress in broadening the bilateral defense cooperation framework. The visit of U.S. Vice

President Kamala Harris to the Philippines in November 2022 provided new momentum for the initiation of the EDCA expansion process, during which the United States announced an investment of USD 82 million to upgrade infrastructure at the military sites previously agreed upon by both sides [6].

The year 2023 represented a significant milestone in U.S.–Philippines defense relations as both countries accelerated the implementation of previously agreed defense cooperation mechanisms, particularly the EDCA. In April 2023, the Philippines officially announced the designation of four additional EDCA sites, increasing the total number of locations accessible to U.S. forces to nine. These new sites are primarily located in northern Luzon and on Palawan Island, occupying strategically important positions near the Taiwan Strait and the South China Sea. Their addition enhanced the U.S. military's force deployment capacity, logistical support capabilities, and operational coordination in the region. At the same time, the expansion further strengthened the Philippines' defense capabilities amid an increasingly complex maritime security environment [7]. The implementation of the expanded EDCA proceeded in parallel with an increased rotational presence of U.S. forces in the Philippines. At sea, the United States also expanded its presence through maritime patrols, port calls, and coordinated operations involving the naval and coast guard forces of both countries. These activities took place against the backdrop of escalating tensions in the South China Sea, particularly following a series of confrontations between the maritime law enforcement agencies of the Philippines and China in the vicinity of Scarborough Shoal. The deployment of naval task groups, maritime patrol aircraft, and Coast Guard vessels not only reaffirmed Washington's commitment to fulfilling its obligations under the Mutual Defense Treaty but also contributed to enhancing maritime domain awareness, strengthening maritime security, and improving operational coordination between the armed forces of the two countries [8], [9], [10].

In 2024, this trend continued through efforts to enhance the operational effectiveness of the EDCA sites. During the Fourth U.S.–Philippines 2+2 Ministerial Dialogue, held in Manila on 30 July 2024, both sides emphasized the role of the EDCA in strengthening coordination, training, and interoperability between their armed forces. The United States also proposed an investment of USD 128 million in its Fiscal Year 2025 budget request for the development of EDCA sites [1]. Alongside infrastructure development, cooperation in military training and the enhancement of operational capabilities continued to expand. In December 2024, the U.S. Air Force deployed A-10 Thunderbolt II attack aircraft to Clark Air Base to conduct joint training with the Philippine Air Force. This deployment not only reflected the qualitative advancement of bilateral military cooperation but also demonstrated the United States' approach to strengthening flexible and distributed force posture across the Indo-Pacific through the Dynamic Force Employment (DFE) concept [11].

3.2.2. Expansion of the Scale and Scope of Joint Military Exercises

During the 2021–2024 period, bilateral military exercises not only resumed following the COVID-19 pandemic but also expanded rapidly in terms of scale, participating forces, and training content. Among

these, Exercise Balikatan remained the largest annual bilateral military exercise and continued to serve as the principal platform for enhancing operational coordination and interoperability between the armed forces of the two countries.

Table 1.2: Summary of the U.S.–Philippines Balikatan Joint Military Exercises (2021–2024)

Year	Exercise	Scale	Key Highlights
2021	Balikatan 36 (scaled-down exercise)	225 U.S. military personnel and 415 Philippine military personnel	Conducted under COVID-19 restrictions; although limited in scale, the exercise carried important symbolic significance by marking the resumption of bilateral military cooperation following the pandemic-induced disruption.
2022	Balikatan 37	More than 9,000 personnel (5,000 from the United States, 3,800 from the Philippines, and 100 from	The largest Balikatan exercise at that time; the first deployment of Patriot air defense missile

		Australia); Japan and the United Kingdom participated as observers.	systems and HIMARS; focused on the South China Sea and Palawan; demonstrated the United States' strategic re-engagement in the region.
2023	Balikatan 38	Approximately 17,600 personnel from the United States, the Philippines, and Australia	The largest Balikatan exercise in the history of the series to date; the first to include live-fire drills conducted at sea and beyond Philippine territorial waters; featured island recapture scenarios, conveying a deterrence message with respect to the South China Sea and the

			Taiwan Strait.
2024	Balikatan 39	Approximately 16,000 personnel from the United States, the Philippines, Australia, and France	One of the largest Balikatan exercises ever conducted; the first to rehearse strikes against maritime targets within the Philippines' Exclusive Economic Zone (EEZ); expanded multilateral participation and strengthened deterrence in the South China Sea.

Source: Compiled by the author based on data from the U.S. Embassy in the Philippines, the U.S. Naval Institute, Rappler, the U.S. Indo-Pacific Command, Indo-Pacific Defense Forum, and other relevant media sources on the U.S.–Philippines Balikatan exercises during the 2021–2024 period.

Balikatan 2021 was conducted under the continuing constraints imposed by the COVID-19 pandemic and was therefore relatively limited in scale, involving approximately 225 U.S. military personnel and 415 personnel from the Armed Forces of the Philippines. Nevertheless, the exercise carried important symbolic significance, as it marked the resumption of bilateral military cooperation on the ground after a one-year interruption. The training focused on staff planning, close air support, maritime security, humanitarian assistance, and disaster relief. Although its scale was constrained by the pandemic, Balikatan 2021 represented an important milestone in re-establishing practical military cooperation between the two countries following the disruption caused by COVID-19 [12].

In 2022, the 37th iteration of Exercise Balikatan was conducted on the largest scale in its history at that time, involving more than 9,000 personnel from the United States, the Philippines, and Australia. The exercise was held across locations stretching from Northern Luzon to Palawan, reflecting the strategic importance that both countries attached to the South China Sea and its adjacent maritime areas. The deployment of advanced U.S. military assets, including the High Mobility Artillery Rocket System (HIMARS) and Patriot air defense missile systems, demonstrated a substantial increase in the complexity and operational realism of the training. Beyond its unprecedented scale and enhanced operational content, Balikatan 2022 also carried important political and strategic significance. Conducted amid rising tensions in the South China Sea and the broader Indo-Pacific region, the exercise reflected the Philippines' adjustment of its defense policy toward strengthening its alliance with the United States. Australia's participation, together with the presence of observers from several countries, further demonstrated that Balikatan had evolved beyond a purely bilateral exercise, increasingly assuming a multilateral character and emerging as an important regional security cooperation mechanism [13].

The year 2023 marked a significant milestone in U.S.–Philippines defense relations under the administration of President Ferdinand Marcos Jr. From 11 to 28 April 2023, the two countries conducted the 38th iteration of Exercise Balikatan across Northern Luzon, Palawan, and Antique, involving approximately 17,600 military personnel from the United States, the Philippines, and Australia. At the time, it was the largest Balikatan exercise ever conducted, with a primary focus on enhancing interoperability among allied forces, strengthening maritime defense and coastal defense, and improving maritime domain awareness. The exercise program included bilateral command post operations, amphibious operations, live-fire exercises, urban warfare, aviation operations, cyber operations, counterterrorism, humanitarian assistance, and disaster response. Notably, Balikatan 2023 was the first to incorporate live-fire exercises at sea, with certain activities conducted beyond the Philippines' territorial waters, including scenarios involving island recapture operations and the sinking of a maritime target. Conducted against the backdrop of Manila's expansion of the Enhanced Defense Cooperation Agreement (EDCA), which granted the United States access to four additional military sites, Balikatan 2023 not only strengthened the Philippines' defense capabilities but also reflected the evolution of the U.S.–Philippines alliance toward enhanced deterrence and deeper integration into the regional security architecture [14], [15].

In 2024, the 39th iteration of Exercise Balikatan further demonstrated the continuing expansion and deepening of defense cooperation between the two countries. Held from 22 April to 10 May 2024, Balikatan 2024 involved more than 16,000 military personnel from the Philippines, the United States, and partner countries, including Australia and France, while representatives from 14 countries participated as observers. Compared with previous iterations, Balikatan 2024 was distinguished by its stronger multilateral character and a higher level of operational complexity, featuring training activities in maritime security, integrated air and missile defense, cyber operations, command and control, as

well as humanitarian assistance and disaster response [16]. Notably, for the first time, the exercise included joint naval operations within the Philippines' Exclusive Economic Zone (EEZ) in the South China Sea, together with the participation of a French naval vessel and the coast guard forces of the two countries. This development reflected the evolution of Balikatan from a bilateral exercise into a broader multilateral security cooperation mechanism focused on maritime security. Another notable feature was the sinking exercise conducted against a maritime target off the coast of Luzon, which was designed to evaluate coordinated fires and integrated joint operational networks in a maritime defense scenario [17]. Overall, Balikatan 2024 not only enhanced interoperability between the armed forces of the United States and the Philippines but also more clearly demonstrated the deterrence function of the bilateral alliance amid rising tensions in the South China Sea. At the same time, it underscored the Philippines' increasingly important role within the regional security architecture promoted by the United States and its allies.

In addition to Balikatan, other bilateral and multilateral exercises-including Salaknib, Kamandag, CARAT, SEACAT, and RIMPAC - also contributed to the development of a diversified framework for defense training and military cooperation between the two countries. Salaknib focused primarily on army-to-army cooperation, particularly in Northern Luzon; Kamandag emphasized amphibious operations, coastal defense, and humanitarian assistance; while CARAT, SEACAT, and RIMPAC provided opportunities for the Philippine Navy to operate alongside the U.S. Navy and partner naval forces in a multilateral operational environment.

3.2.3. Strengthening Bilateral Defense Dialogue Mechanisms

Alongside the expansion of the U.S. military presence and joint military exercises, bilateral defense dialogue mechanisms played an important role in guiding and coordinating defense cooperation between the United States and the Philippines. Mechanisms such as the Bilateral Strategic Dialogue (BSD), the 2+2 Ministerial Dialogue, the Mutual Defense Board–Security Engagement Board (MDB–SEB), and other institutional frameworks provided a solid foundation for sustaining alliance commitments and addressing emerging security challenges.

The year 2021 marked the resumption of in-person defense dialogue between the United States and the Philippines following the disruption caused by the COVID-19 pandemic and the uncertainties that had characterized bilateral relations under the administration of President Rodrigo Duterte. U.S. Secretary of Defense Lloyd Austin's visit to the Philippines in July 2021, together with subsequent ministerial-level consultations, contributed to Manila's decision to suspend the termination of the Visiting Forces Agreement (VFA), while also creating favorable conditions for advancing the implementation of the Enhanced Defense Cooperation Agreement (EDCA) [18], [19]. In particular, the Ninth Bilateral Strategic Dialogue, held in November 2021, adopted the Joint Vision Statement for a 21st Century United States–Philippines Partnership, reaffirming the two countries' commitment to maintaining the alliance, strengthening their shared defense and security capabilities, and responding jointly to regional challenges [20], [21]. These developments indicate that, following a period of

uncertainty, the U.S.–Philippines alliance began to regain stability and become more highly institutionalized.

From 2022 onward, following the inauguration of President Ferdinand Marcos Jr., bilateral defense dialogue gained renewed momentum, reflecting the broader "reinvigoration" of the U.S.–Philippines alliance. The meeting between President Joe Biden and President Marcos Jr. on the sidelines of the United Nations General Assembly in September 2022 reaffirmed Washington's commitment to the security of the Philippines, particularly amid rising tensions in the South China Sea [22]. In the same year, the Mutual Defense Board–Security Engagement Board (MDB–SEB) continued to serve as the principal mechanism for coordinating substantive defense cooperation. During its meetings, both sides agreed on a plan to implement more than 500 bilateral defense and security cooperation activities in 2023, focusing on maritime security, counterterrorism, cybersecurity, humanitarian assistance, and disaster response [23].

The year 2023 witnessed a clear upgrading of U.S.–Philippines defense dialogue mechanisms in both substance and institutionalization. At the Tenth Bilateral Strategic Dialogue and the Third 2+2 Ministerial Dialogue, the two sides agreed to accelerate the full implementation of the Enhanced Defense Cooperation Agreement (EDCA), designate four additional EDCA sites, strengthen intelligence sharing, negotiate a General Security of Military Information Agreement (GSOMIA), and develop a roadmap to support the modernization of the Armed Forces of the Philippines [24], [25]. The publication of the Bilateral Defense Guidelines in May 2023 further established a strategic framework for long-term defense cooperation, covering maritime security, counterterrorism, humanitarian assistance, disaster response, and enhanced interoperability between the armed forces of the two countries [26]. These developments demonstrate that bilateral defense dialogue evolved beyond the traditional function of maintaining the alliance to encompass cooperation in addressing emerging security challenges.

In 2024, this trend was further reinforced through the Fourth U.S.–Philippines 2+2 Ministerial Dialogue, held in Manila. The fact that this mechanism was convened in the Philippines for the first time underscored the growing importance of the bilateral alliance in the security policies of both countries. During the dialogue, the two sides reaffirmed that the 1951 Mutual Defense Treaty (MDT) applies to armed attacks against the armed forces, aircraft, and public vessels of either party—including coast guard vessels—in the South China Sea. They also advanced initiatives aimed at defense modernization, strengthening cybersecurity, enhancing the operational effectiveness of EDCA sites, and supporting the Philippines' defense capabilities [1]. Overall, the bilateral defense dialogue mechanisms established during the 2021–2024 period contributed to transforming U.S.–Philippines defense relations from a phase of post-crisis recovery into one of deeper consolidation, characterized by a higher degree of institutionalization and closer alignment with the evolving regional security environment.

3.2.4. Expanding Defense Cooperation within Multilateral Frameworks

In addition to bilateral mechanisms, U.S.–Philippines defense relations during the 2021–2024 period were further strengthened through multilateral and minilateral cooperation frameworks. In the military domain, this multilateral dimension was most clearly reflected in exercises such as Balikatan, CARAT, SEACAT, and RIMPAC, in which U.S. and Philippine forces trained alongside partners including Australia, Japan, France, the Republic of Korea, and several other countries. The participation of, or observation by, allied and partner countries in these activities demonstrates that defense cooperation between the United States and the Philippines has evolved beyond the traditional bilateral framework and has become increasingly integrated into the broader security network of the Indo-Pacific. Through these multilateral training activities, the Philippines has enhanced its operational coordination, maritime security capabilities, disaster response capacity, and interoperability with U.S. forces and regional partners.

At the institutional level, the United States and the Philippines also coordinated closely through multilateral security forums, including the Shangri-La Dialogue, the ASEAN Defence Ministers' Meeting-Plus (ADMM-Plus), and ASEAN–U.S. defense cooperation mechanisms. Notably, in 2023, the Philippines, together with Japan, was selected to co-chair the ADMM-Plus Experts' Working Group on Maritime Security, reflecting Manila's increasingly proactive role in addressing regional maritime security issues [27]. In the same year, following the Third U.S.–Philippines 2+2 Ministerial Dialogue, the two countries promoted the idea of expanding joint patrols in the South China Sea to include the participation of additional partners, reflecting a broader trend toward the multilateralization of maritime security cooperation in response to increasingly complex regional security challenges [28].

A particularly notable development in multilateral defense cooperation during this period was the establishment and gradual institutionalization of the trilateral cooperation mechanism among the United States, Japan, and the Philippines. Beginning in 2022, Washington and Tokyo intensified engagement with Manila to promote regional security cooperation, particularly in the areas of freedom of navigation, maritime security, and the enhancement of the Philippines' defense capabilities. In September 2022, the three countries convened their first Trilateral Defense Policy Dialogue, followed in December by the establishment of a trilateral military dialogue mechanism, which laid the institutional foundation for cooperation among their armed forces [29]. Throughout 2023, meetings among the foreign ministers of the United States, Japan, and the Philippines continued to advance cooperation in maritime security, information sharing, support for the modernization of the Armed Forces of the Philippines, and responses to non-traditional security challenges [30]. These high-level engagements also laid the groundwork for the first Trilateral Summit among the United States, Japan, and the Philippines, held in April 2024.

The development of this trilateral mechanism carried important strategic implications for both the Philippines and the United States. For Manila, cooperation with Japan alongside the United States

contributed to diversifying sources of defense assistance while expanding access to military training, defense equipment, and expertise in maritime security governance. For Washington, the mechanism strengthened connectivity among its allies and partners within a more flexible regional security network, consistent with its vision of a Free and Open Indo-Pacific. Accordingly, U.S.–Japan–Philippines cooperation reflects a broader transition from the traditional hub-and-spokes model of bilateral alliances toward a multilayered and minilateral security framework designed to strengthen deterrence and enhance policy coordination in addressing regional security challenges.

Beyond the trilateral mechanism, the Philippines also demonstrated a growing inclination to engage with regional security initiatives promoted by the United States and its allies, including the Quad and AUKUS. Although the Philippines is not a formal member of the Quad, it has benefited from cooperation initiatives related to maritime security, maritime domain awareness, and disaster response capacity-building [31]. With regard to AUKUS, Manila adopted a generally positive position, viewing the initiative as a factor that could contribute to maintaining the strategic balance and preserving freedom of navigation in the Indo-Pacific [32]. This supportive stance reflects the Philippines' increasingly proactive participation in regional security architectures led by the United States and its allies, while also seeking to leverage these frameworks to strengthen its own national defense capabilities.

Overall, cooperation within multilateral and minilateral frameworks constituted an important dimension of U.S.–Philippines defense relations during the 2021–2024 period. These activities not only enhanced the Philippines' defense capabilities and maritime security capacity but also embedded the U.S.–Philippines alliance more firmly within a broader regional security network. Consequently, the Philippines gradually evolved from being primarily a recipient of security guarantees to becoming a more proactive participant in regional security cooperation mechanisms, while the United States further consolidated its network of alliances and partnerships across Southeast Asia and the wider Indo-Pacific.

3.2.5. Defense Procurement, Military Assistance, and Defense Capability Modernization

Defense procurement, military assistance, and support for defense modernization constituted an important dimension of U.S.–Philippines defense relations during the 2021–2024 period. As the Philippines accelerated the modernization of its armed forces, U.S. assistance focused on key capability areas, including intelligence, surveillance, and reconnaissance (ISR), military airlift, maritime security, coastal defense, and interoperability with U.S. forces. Beyond serving as a form of technical and military assistance, these initiatives reflected the substantive depth of the U.S.–Philippines alliance amid the evolving security environment in the South China Sea and the broader Indo-Pacific region.

In 2021, the United States continued to support the enhancement of the Philippines' defense capabilities through the transfer of four ScanEagle unmanned aerial systems, valued at approximately USD 4

million, to the Philippine Air Force. These systems strengthened the country's intelligence, surveillance, and reconnaissance (ISR) capabilities while supporting counterterrorism operations, humanitarian assistance, and disaster response missions [33]. At the same time, defense acquisition mechanisms such as the Foreign Military Sales (FMS) program and Direct Commercial Sales (DCS) continued to facilitate the Philippines' access to U.S. defense equipment, including aircraft, helicopters, weapon systems, and other military assets required for the modernization of the Armed Forces of the Philippines [34], [35].

From 2022 onward, alongside the marked improvement in bilateral alliance relations under the administration of President Ferdinand Marcos Jr., defense assistance between the two countries gained significant momentum. The United States committed USD 82 million to upgrade infrastructure at military sites designated under the Enhanced Defense Cooperation Agreement (EDCA), thereby improving logistical capacity, force reception capabilities, and support for joint military training [36]. This investment was strategically significant not only because it facilitated the rotational deployment of U.S. forces but also because it strengthened the Philippines' territorial defense capabilities and its capacity to respond to humanitarian emergencies and natural disasters in strategically important areas.

In 2023, defense modernization cooperation became increasingly institutionalized through high-level bilateral dialogue mechanisms. During the Third U.S.–Philippines 2+2 Ministerial Dialogue, the United States reaffirmed its commitment to supporting the modernization of the Armed Forces of the Philippines over the following five to ten years, with priority areas including unmanned aerial systems, patrol vessels, air defense systems, and coastal defense capabilities. In the same year, the administration of President Joe Biden also announced plans to transfer three C-130H military transport aircraft to the Philippines, with the aim of enhancing Manila's strategic airlift, logistical support, and force deployment capabilities [37]. These initiatives demonstrate that U.S. defense assistance has become increasingly aligned with the Philippines' requirements for strengthening territorial defense and maritime security.

In 2024, this trend toward defense modernization assistance continued to accelerate. During the Fourth U.S.–Philippines 2+2 Ministerial Dialogue, held in Manila on 30 July 2024, the United States announced an allocation of USD 500 million in Foreign Military Financing (FMF) for the Philippines to strengthen the capabilities of both the Armed Forces of the Philippines and the Philippine Coast Guard in carrying out territorial defense missions and contributing to regional security. The two sides also advanced the implementation of the Security Sector Assistance Roadmap, which identified medium- and long-term priorities for defense modernization while reaffirming their commitment to the effective operationalization of EDCA sites [38].

3.3. Factors Driving the Recovery and Strengthening of U.S.–Philippines Defense Relations (2021–2024)

3.3.1. The Regional Strategic Environment and Competition among Major Powers

Entering the third decade of the twenty-first century, the Indo-Pacific region has continued to occupy a central position in the global security and economic architecture. The strategic shift of major powers toward the region has intensified competition for influence, most notably the strategic competition between the United States and China. This competition has expanded beyond the economic, technological, and diplomatic spheres to the field of defense and security, particularly in strategically significant areas such as the South China Sea and the Taiwan Strait.

Against this backdrop, the South China Sea has remained one of the region's major security hotspots. Disputes over sovereignty claims, the militarization of maritime features, together with the increasing law enforcement activities and military presence of the parties concerned, have heightened the risk of conflict and directly affected the security environment in Southeast Asia. For the United States, maintaining freedom of navigation, preserving a rules-based regional order, and ensuring access to strategic sea lines of communication have become among its core interests in the region. Meanwhile, China has continued to expand its strategic influence and strengthen its presence in the South China Sea in order to safeguard its security and development interests. These developments have created an increasingly intense competitive environment between the two major powers while placing Southeast Asian countries under growing pressure to adjust their foreign and defense policies in response to the evolving strategic environment.

The Philippines is one of the countries most directly affected by these developments. Owing to its geostrategic location at the western gateway to the Pacific Ocean, its proximity to the South China Sea, and its position along the First Island Chain, the Philippines occupies an important place in the strategic competition between the United States and China. From Washington's perspective, the Philippines is a long-standing treaty ally in Southeast Asia and an important strategic location for maintaining U.S. military presence and strengthening deterrence in the Western Pacific. For the Philippines, the need to safeguard national sovereignty, ensure maritime security, and enhance defense capabilities has encouraged the country to strengthen cooperation with its strategic partners, among which the United States has continued to play the leading role as its most important defense partner.

In addition to the strategic competition between the United States and China, the regional security environment during the 2021–2024 period was also affected by a number of international developments, most notably the Russia–Ukraine conflict, the increasingly complex situation in the South China Sea, and the rise of non-traditional security challenges. These factors not only increased uncertainty in the regional security environment but also prompted Southeast Asian countries to strengthen their defense capabilities, expand security cooperation, and diversify their foreign relations in order to enhance their capacity to respond to strategic risks. In this context, defense relations

between the United States and the Philippines were increasingly strengthened and became one of the important pillars of the Indo-Pacific regional security architecture.

Another important factor was the implementation of the U.S. Indo-Pacific Strategy, which aims to promote a "free and open" Indo-Pacific while emphasizing the role of alliances and partnerships in maintaining the regional strategic balance. This policy provided the basis for Washington to strengthen defense cooperation with its traditional allies, particularly the Philippines. At the same time, the increasingly complex developments in the South China Sea also prompted Manila to adjust its policy toward closer cooperation with the United States in order to enhance its defense capabilities and safeguard its national interests.

In summary, strategic competition among the major powers, security developments in the South China Sea, and changes in the regional strategic environment created important objective conditions for the development of U.S.–Philippines defense relations during the 2021–2024 period. These factors also provided the foundation for the two countries to continue consolidating their alliance and expanding cooperation across various areas of defense in the years that followed.

3.3.2. Policy Adjustments by the United States and the Philippines (2021–2024)

In addition to changes in the international and regional environment, adjustments in the foreign and defense policies of the United States and the Philippines constituted a direct driving force behind the significant development of bilateral defense relations during the 2021–2024 period.

For the United States, upon assuming office in January 2021, President Joe Biden identified strategic competition with China as one of the foremost priorities of U.S. foreign policy. Building upon the strategic orientation established by the previous administration, the Biden administration continued to implement the Indo-Pacific Strategy while emphasizing the strengthening of the network of alliances and partnerships as the foundation for maintaining U.S. leadership in the region. Unlike the predominantly bilateral approach adopted by the Donald Trump administration, the Biden administration regarded multilateral cooperation mechanisms and the alliance system as essential instruments for preserving the balance of power, upholding a rules-based regional order, and enhancing deterrence against increasingly complex security challenges.

Within this strategic framework, the Philippines was identified as an ally of particular strategic importance. Located along the First Island Chain and adjacent to both the South China Sea and the Taiwan Strait, the Philippines occupies a critical position in ensuring the United States' ability to project and deploy forces in the Western Pacific. Accordingly, Washington pursued the consolidation of existing defense cooperation mechanisms, strengthened the effectiveness of the 1951 Mutual Defense Treaty (MDT), accelerated the implementation of the Enhanced Defense Cooperation Agreement (EDCA), and expanded cooperation in such areas as military training, intelligence sharing, maritime security, missile defense, and support for the modernization of the Armed Forces of the

Philippines. At the same time, the United States repeatedly affirmed that any armed attack against Philippine armed forces, public vessels, or aircraft in the South China Sea would fall within the scope of the Mutual Defense Treaty, thereby reinforcing deterrence and strengthening Manila's confidence in Washington's security commitments.

On the Philippine side, the period under study witnessed a significant adjustment in the country's foreign and defense policies. During the final stage of President Rodrigo Duterte's administration (2021–June 2022), although Manila continued to pursue an “independent” foreign policy and sought to improve relations with China, the increasingly complex situation in the South China Sea, together with the need to modernize the country's armed forces, prompted the Philippines to maintain defense cooperation with the United States. In practice, bilateral military exercises, counterterrorism cooperation, training assistance, and defense assistance continued to be implemented, reflecting the resilience and continuity of the alliance despite differences in the policy orientations of the two governments.

A turning point in U.S.–Philippines relations occurred following the inauguration of Ferdinand Marcos Jr. as President of the Philippines in June 2022. In contrast to his predecessor, Rodrigo Duterte, the Marcos Jr. administration adjusted its foreign policy toward strengthening relations with the country's traditional allies and partners, with the United States being identified as the key strategic partner in enhancing national defense capabilities and safeguarding national security. In response to the increasingly complex developments in the South China Sea and intensifying competition among major powers, Manila sought to make more effective use of its existing defense cooperation mechanisms with the United States while simultaneously expanding defense cooperation with like-minded partners such as Japan and Australia. This policy adjustment reflected the Philippines' broader effort to strengthen its security alignments in order to enhance deterrence, protect national interests, and maintain stability within the regional security environment.

This policy adjustment was driven by several factors. First, China's expanding presence in the South China Sea and the increasingly frequent encounters between the maritime law enforcement agencies of the two countries heightened the Philippines' concerns over maritime security. Second, the modernization program of the Armed Forces of the Philippines required substantial financial resources, advanced technologies, and professional training, all of which the United States was well positioned to provide. Third, amid intensifying strategic competition among major powers, strengthening relations with the United States was regarded by Manila as an important means of enhancing deterrence and reinforcing the Philippines' strategic position in the region.

The convergence of strategic interests between the two countries created favorable conditions for U.S.–Philippines defense relations to enter a new phase of development. While the United States regarded the Philippines as an important link in the Indo-Pacific regional security architecture, the Philippines likewise viewed its alliance with the United States as one of the principal pillars of its national security

and the protection of its interests in the South China Sea. This convergence of interests provided the foundation for expanding bilateral defense cooperation across multiple areas from 2022 onward, including the expansion of EDCA, the increased scale of the Balikatan exercises, the enhanced rotational presence of U.S. forces in the Philippines, and closer cooperation in intelligence sharing, logistics, and the enhancement of operational capabilities.

Overall, the policy adjustments undertaken by both the United States and the Philippines during the 2021–2024 period not only reflected the need to adapt to changes in the regional security environment but also provided an important impetus for the deepening of bilateral defense relations. These adjustments constituted the immediate foundation for the notable expansion of defense cooperation between the two countries, particularly in the implementation of EDCA, joint military exercises, defense assistance, and coordination in maritime security.

3.3.3. The Role of Bilateral Defense Cooperation Mechanisms

In addition to the impact of the regional strategic environment and the adjustments in the foreign and defense policies of both governments, the recovery of U.S.–Philippines defense relations during the 2021–2024 period was also underpinned by a well-established institutional framework that had been developed and maintained over several decades. Rather than building an entirely new framework for cooperation, the U.S.–Philippines alliance has long rested upon a comprehensive system of treaties, agreements, and institutionalized dialogue mechanisms. This institutional foundation enabled both countries to restore, adapt, and expand defense cooperation rapidly in response to evolving regional strategic dynamics.

First, the 1951 Mutual Defense Treaty (MDT) continued to serve as the alliance's fundamental legal foundation. Although bilateral relations experienced considerable fluctuations during the presidency of Rodrigo Duterte, the MDT remained the principal legal basis underpinning the security commitments between the two allies. During the 2021–2024 period, the United States repeatedly reaffirmed its commitment to the Philippines, particularly in matters concerning security in the South China Sea, thereby reinforcing the credibility of the alliance. Notably, Washington's position that armed attacks against Philippine armed forces, public vessels, or aircraft in the South China Sea could fall within the scope of the MDT further strengthened Manila's strategic confidence in the U.S. security commitment.

Alongside the MDT, the Visiting Forces Agreement (VFA) and the Enhanced Defense Cooperation Agreement (EDCA) provided the immediate legal framework for bilateral military cooperation. The Philippine government's decision to retain the VFA in 2021 was particularly significant, as the agreement constitutes the legal basis for U.S. force deployment, military training, joint exercises, and personnel rotation in the Philippines. Meanwhile, the expansion of EDCA from five to nine agreed locations in 2023 demonstrated that bilateral defense cooperation was not only restored but also substantially upgraded. This expansion enhanced the rotational presence of U.S. forces, strengthened

logistical capabilities, improved rapid response capacity, and supported the modernization of the Philippines' defense infrastructure.

In addition to these foundational agreements, operational cooperation mechanisms and defense dialogue platforms also played an important role in sustaining the momentum of the alliance. The Balikatan exercises expanded considerably in terms of scale, operational scope, and the participation of partner countries, reflecting increasingly close military coordination between the two allies. At the same time, institutional mechanisms such as the Bilateral Strategic Dialogue, the 2+2 Ministerial Dialogue, the Mutual Defense Board (MDB), and the Security Engagement Board (SEB) continued to function as regular channels for strategic consultation, policy coordination, and the management of issues arising in bilateral defense cooperation. Furthermore, the adoption of the U.S.–Philippines Bilateral Defense Guidelines in 2023 further clarified the strategic direction of bilateral defense cooperation while establishing new alliance priorities in response to the evolving regional security environment.

From an institutional perspective, the recovery of U.S.–Philippines defense relations was not merely the result of changes in the regional strategic environment or the political will of the two governments. It was also made possible by the continued functioning of a well-established network of treaties, dialogue mechanisms, and cooperative frameworks that had been built over decades. This institutional architecture enabled the alliance to maintain its resilience even during periods of uncertainty while facilitating the rapid reactivation and expansion of defense cooperation during 2021–2024. Consequently, institutional mechanisms should be regarded as one of the key factors underpinning both the recovery and the deeper development of U.S.–Philippines defense relations amid an increasingly complex regional security environment.

3.4. Overall Assessment

Overall, the U.S.–Philippines defense relationship during the period 2021–2024 demonstrated a clear process of recovery, consolidation, and upgrading of a traditional alliance amid significant changes in the regional security environment. Following a period affected by the COVID-19 pandemic and fluctuations in foreign policy under President Rodrigo Duterte, bilateral defense relations gradually recovered from 2021 and gained stronger momentum after President Ferdinand Marcos Jr. assumed office. The Philippines' decision to maintain the Visiting Forces Agreement (VFA), expand the implementation of the Enhanced Defense Cooperation Agreement (EDCA), resume high-level dialogue mechanisms, and increase the scale of joint military exercises indicates that defense cooperation has remained the most stable pillar of the U.S.–Philippines relationship.

A defining feature of this period was the transformation of bilateral defense cooperation from maintaining a traditional alliance framework toward strengthening territorial defense capabilities, maritime security, and regional deterrence. The Balikatan exercises in 2023 and 2024 reflected significant changes in terms of scale, operational content, and training objectives. While previous

military cooperation had primarily focused on counterterrorism, humanitarian assistance, and disaster response, the focus during this period expanded to include coastal defense, live-fire maritime exercises, maritime domain awareness, joint operational coordination, and the protection of strategically significant areas. This shift reflected the Philippines' growing demand to enhance its defense capabilities in response to increasingly complex security challenges in the South China Sea.

Furthermore, bilateral defense relations became increasingly institutionalized. Mechanisms such as the Bilateral Strategic Dialogue, the 2+2 Ministerial Dialogue, the Mutual Defense Board, and the Security Engagement Board have provided regular frameworks for policy coordination and the implementation of concrete cooperation initiatives. The announcement of the Bilateral Defense Guidelines in 2023, the promotion of defense modernization assistance programs, and the increased operationalization of EDCA sites demonstrate that the bilateral alliance has not only been politically revitalized but also reinforced through substantive, long-term, and more adaptable cooperation mechanisms in response to emerging security challenges.

Another notable trend was the increasing multilateralization of U.S.–Philippines defense relations. Bilateral cooperation has expanded beyond the traditional two-country framework through greater involvement of partners such as Japan, Australia, France, and other countries in joint exercises, strategic dialogues, and regional security initiatives. In particular, the emergence of trilateral cooperation among the United States, Japan, and the Philippines indicates Manila's deeper integration into the broader security network promoted by Washington and its allies in the Indo-Pacific region. This development reflects a shift from a traditional bilateral alliance model toward a more flexible, multi-layered, and interconnected security cooperation architecture.

In terms of strategic implications, the U.S.–Philippines defense relationship during 2021–2024 generated significant benefits for both countries. For the United States, the Philippines represents a critical component of its alliance network in Southeast Asia, enabling Washington to maintain forward military presence, enhance force deployment capabilities, and strengthen its commitment to a free and open Indo-Pacific strategy. For the Philippines, cooperation with the United States has contributed to improving defense capabilities, supporting military modernization, enhancing maritime surveillance capacity, strengthening coastal defense, and addressing security challenges in the South China Sea.

Nevertheless, the development of U.S.–Philippines defense relations has also generated complex implications for the regional security environment. On the one hand, the expanded presence of the United States and its allies may contribute to maintaining the regional balance of power, supporting freedom of navigation, and constraining unilateral actions that could alter the status quo in the South China Sea. On the other hand, the expansion of military presence and strengthened deterrence activities may intensify U.S.–China strategic competition, thereby making the regional security environment more sensitive and potentially increasing tensions. For the Philippines, the key challenge lies in

maximizing the benefits of its alliance with the United States while preserving strategic autonomy in foreign policy and avoiding excessive entanglement in great-power rivalry.

From a regional perspective, the development of U.S.–Philippines defense relations has direct implications for the security architecture of Southeast Asia and the South China Sea. The strengthening of this alliance simultaneously provides additional support for maintaining a rules-based regional order while also creating challenges for ASEAN in preserving its central role and maintaining a balanced approach in relations with major powers.

4. CONCLUSION

In conclusion, the U.S.–Philippines defense relationship during 2021–2024 reflects a significant revival of the bilateral alliance while also demonstrating strategic adjustments by both Washington and Manila in response to evolving regional security dynamics. The expansion of cooperation in areas such as military presence, joint exercises, defense dialogues, military modernization assistance, and multilateral security initiatives has contributed to strengthening the Philippines' defense capabilities while reinforcing the strategic role of the United States in Southeast Asia.

Beyond the bilateral framework, this relationship has broader implications for the security environment of the South China Sea and the wider Indo-Pacific regional order. The evolution of U.S.–Philippines defense cooperation therefore represents not only a process of alliance revitalization but also an important factor shaping contemporary regional security dynamics.

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